

From: "jeffrey E." <jeevacation@gmail.com>
To: Brad Wechsler <[REDACTED]>
Subject: Fwd: Re:
Date: Tue, 18 Apr 2017 14:08:55 +0000

----- Forwarded message -----

From: Richard Joslin <[REDACTED]>
Date: Mon, Apr 17, 2017 at 7:01 PM
Subject: RE: Re:
To: "jeffrey E." <jeevacation@gmail.com>

This was a sale and should be claimed in the year of sale as reduction of sales proceeds (cost of sale).

From: jeffrey E. [mailto:jeevacation@gmail.com]
Sent: Monday, April 17, 2017 6:29 PM
To: Richard Joslin <[REDACTED]>
Subject: Re: Re:

and the fees for structuring the phaidon transaction. ? as part of his income tax planning.? I think so. dont you?

On Mon, Apr 17, 2017 at 6:25 PM, Richard Joslin <[REDACTED]> wrote:

I will get you the backup for estate planning nondeductibility

From: jeffrey E. [mailto:jeevacation@gmail.com]
Sent: Monday, April 17, 2017 6:18 PM
To: Richard Joslin <[REDACTED]>
Subject: Re:

order to be deductible, the [IRS](#) requires that [estate planning fees](#) must be paid: (1) for the production or collection of income; (2) for the management, conservation or maintenance of property held for the production of income; or (3) in connection with the determination, collection or [refund](#) of any tax.

So how might this apply to estate planning fees? If, for example, the [estate plan](#) involves advice on the construction of income generating instruments, such as an [income trust](#), or provides guidance on the use of property transfer methods to avoid [Federal or State Estate or Inheritance tax](#), these would meet the IRS restrictions for the ability to deduct such expenses. Other examples might include [investment advice](#) for trusts held by the estate, trust tax preparation fees and account custodial fees while held by the estate

Read more: [Are estate planning fees tax deductible? | Investopedia http://www.investopedia.com/ask/answers/113015/are-estate-planning-fees-tax-deductible.asp#ixzz4eY1kslWb](http://www.investopedia.com/ask/answers/113015/are-estate-planning-fees-tax-deductible.asp#ixzz4eY1kslWb)

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On Mon, Apr 17, 2017 at 6:13 PM, Richard Joslin <[REDACTED]> wrote:

Income tax planning and fees for services to calculate the income tax are deductible

From: jeffrey E. [mailto:jeevacation@gmail.com]

Sent: Monday, April 17, 2017 6:09 PM

To: Richard Joslin <[REDACTED]>

Subject:

are fees for tax planning deductible?

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