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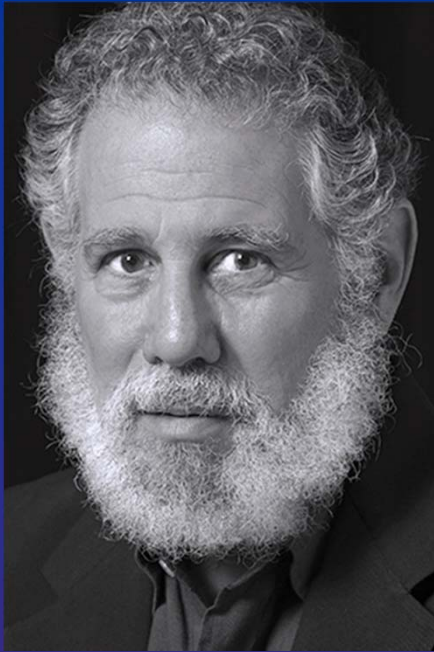
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LEIMBERG Information Services, Inc. (LISI)

MAXIMIZING YOUR MEMBERSHIP BENEFITS

Estate Planning Council of Greater Miami

Mark Scott, Kaufman Rossin
January 21, 2016



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COUNCIL

MEMBERSHIP BENEFITS:

- Analysis and Commentaries by Leading Experts
 - *New Cases, Rulings, and Legislation*
 - *Old Cases, Rulings, and Legislation*
- Accessible by using LISI's incredibly powerful search engine 24/7/365.
- Members create customized searches to locate specific topics, references, and citations of particular interest to them.



LOGIN – MAIN MENU

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The screenshot shows a website navigation menu with various service categories and a search function.

Top Navigation Bar (Red):

- Leimberg Information Services
- Webinars
- Podcast Services
- Data Net
- Tax Research Sites
- Useful Numbers
- 7520 & AFR Rates
- Calcs & Charts
- Form Finder
- IRS Tax Tips
- Steves's Software & Books
- Code Searcher
- To Update Email & Account Info.

Secondary Navigation (Dark Red):

- FAST, FRANK, INCISIVE ANALYSIS
- Contact Us
- Weather
- Time

Newsletter Archives (Blue):

CLICK TABS BELOW FOR NEWSLETTER ARCHIVES

- Estate Planning
- Finance & Markets
- Elder Care Planning
- Charitable Planning
- Employee Benefit / Retirement
- Business Entities
- Asset Protection Planning
- Income Tax Planning
- Law Threads
- Actual Text
- Corp. / LLC Partnership Resources
- Super Searcher
- State Laws
- Blog Watch

SPECIAL SERVICES (Blue):

SPECIAL SERVICES

Search Function:

Search ALL LISI Archives
 CLICK HERE for the USER'S GUIDE

Search archives for: Find it

All Archives ▼ [Click for Search Tips](#) [Click for Most Recent Newsletters](#)



LOGIN – RECENT ENTRIES

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Welcome to Leimberg Information Services Inc.



[CLICK HERE for the USER'S GUIDE](#)

Search archives for:

Find it

Newsletters ▾

[Click for Search Tips](#)

[Click for Most Recent Newsletters](#)

Recent Entries:

Newsletters

Actual Text

Law Threads

Journals

Web Links

Podcasts

Blog Watch

Newsletters

AFRs for February Announced Steve Leimberg's Estate Planning Newsletter Issue:2382 20-Jan-16

Chris Riser, Jay Adkisson & David Slenn: Understanding How the PATH Act Impacts Section 831(b) Captives Steve Leimberg's Asset Protection Planning Newsletter Issue:312 19-Jan-16

Kevin Packman: Leaver Accounts & the Swiss Bank Program, What Does It Mean to Those with an Unreported Account? Steve Leimberg's International Tax Planning Newsletter Issue:2 18-Jan-16

Finance 1.16.2016 Bob LeClair's Finance and Markets Newsletter Issue:841 18-Jan-16

An Important Announcement: The International Tax Planning Newsletter Steve Leimberg's International Tax Planning Newsletter Issue:1 18-Jan-16

FLASH: Marty Shenkman's Compilation Notes from Heckerling 2016 Steve Leimberg's Estate Planning Newsletter Issue:2381 17-Jan-16

Keith Schiller & Estate Planning At The Movies(R): PLR 201548004 Brings Belated Happiness with a Late Portability Election in the Spirit of the Breakfast Club Steve Leimberg's

Actual Text

Rev. Rul. 2016-4, 2016-6 IRB 1 IRS Announces Applicable Federal Rates for February 2016 updated:20-Jan-16

Family Chiropractic Sports Injury & Rehab Clinic Inc. v. Commissioner, T.C. Memo. 2016-10, No. 29613-13R (19 January 2016) Tax Court Holds ESOP Does Not Meet IRC Qualification Requirements updated:20-Jan-16

PLR 201603043 (21 October 2015) IRS Grants Waiver of Rollover Requirement for Qualified Plan Distribution updated:19-Jan-16

PLR 201603045 (29 October 2015) IRS Waives Rollover Requirement for SEP-IRA Distribution updated:19-Jan-16

PLR 201603048 (21 October 2015) IRS Grants Extension to Recharacterize Roth IRA Contributions updated:19-Jan-16

PLR 201603007 (17 August 2015) IRS Grants Extension to Make Portability Election updated:19-Jan-16

Notice 2016-7, 2016-5 IRB 1 (15 January 2016) Update for Weighted Average Interest Rates, Yield Curves, and Segment Rates

Instant Audio and Podcasts

60 Second Planner

Income Tax Deduction Denied for Failure to Supply Appraisal updated:20-Jan-16

Proposed Alaska Income Tax Would Affect Trusts updated:14-Jan-16

Draft Instructions for Form 8971 updated:08-Jan-16

Podcasts

Keebler, Angkatavanich and Dougherty on Estate of Purdue v. Commissioner updated:11-Jan-16

Keebler and Angkatavanich on Section 2701 Basics updated:29-Oct-15

Keebler and Blattmachr on Sophisticated GST Tax Planning updated:06-Aug-15

Keebler and Blattmachr on Expected Valuation Discount Regulations updated:04-Jun-15

Keebler and Blattmachr on Tax Law Change Through Executive Action

BlogWatch

Clinton Rolls Out Estate Tax Proposal 14-Jan-16

Asset Protection: The Year in Review 12-Jan-16

A Guide to Life Settlements 12-Jan-16

User Fees Increasing for IRA Private Letter Ruling Requests 11-Jan-16

Income Tax Treatment of Cost of Defending Fraudulent Transfer Claim 10-Jan-16

Evaluating Options Under Defined-Benefit Pension Plans 10-Jan-16

Tax Court: IRS Not Bound by State Court Finding that Payments Were Gifts 10-Jan-16

Taxpayer Advocate Report Urges Greater 1023-EZ Scrutiny 07-Jan-16

IRS Withdraws Controversial Proposed Regulations on Donee Reporting of Contributions



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You'll find these and many other features of your LISI membership unique and invaluable to your practice

- Newsletters
- Actual Text
- Law Threads
- Key Rates Archive
- Journals
- Corporations
- LLC / Partnerships
- Links
- IRS Tax Tips
- Code Searcher
- SuperSearcher
- Tax research sites
- Podcast Services
- Blog Watch



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NEWSLETTERS

Provides FAST, FRANK, INCISIVE commentary on important recent cases, rulings, and legislation.

- Every Monday, LISI posts finance authority Bob LeClair's latest review of what's going on in finance.
- click on the FINANCE and MARKETS newsletter tab.
- Tuesday thru Friday, commentaries on recent cases, rulings, and legislation are added to the Estate Planning, Elder Care Planning, Employee Benefit and Retirement Planning, Business Entities, Asset Protection Planning, and Charitable Planning newsletters.



NEWSLETTERS - DETAIL

Steve Leimberg's Estate Planning Newsletter Archives

Newsletter #	Subject	Date Published
2382	AFRs for February Announced	1/20/2016 8:57:19 AM
2381	FLASH: Marty Shenkman's Compilation Notes from Heckerling 2016	1/17/2016 11:35:45 AM
2380	Keith Schiller & Estate Planning At The Movies(R): PLR 201548004 Brings Belated Happiness with a Late Portability Election in the Spirit of the Breakfast Club	1/14/2016 8:42:33 PM
2379	FLASH: Marty Shenkman's Meeting Notes from Heckerling, Wednesday Sessions, January 13, 2016	1/14/2016 9:34:02 AM
2378	Chuck Rubin: Using Transcripts in Lieu of Estate Tax Closing Letters	1/13/2016 9:56:50 PM
2377	FLASH: Marty Shenkman's Meeting Notes from Heckerling, Tuesday Afternoon Sessions, January 12, 2016	1/13/2016 3:07:05 PM
2376	Marty Shenkman's Heckerling 2016 Notes: Tuesday Morning All Sessions	1/13/2016 9:25:37 AM
2375	FLASH: Marty Shenkman's Meeting Notes from Heckerling, Monday, January 11, 2016	1/12/2016 7:00:55 AM
2374	Steve Leimberg on Purdue: Gifts of LLC Interests Excludable, Qualify for Annual Exclusion, and Interest on Loans from Beneficiaries Deductible	1/11/2016 4:57:42 PM
2373	FLASH: Bill Lipkind's 2016 ING Update	1/8/2016 9:23:07 AM
2372	Steve Oshins Releases 3rd Annual Trust Decanting State Rankings Chart, This One Interactive!	1/7/2016 9:36:41 PM
2371	Ron Aucutt's	1/4/2016 8:59:53 PM

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ACTUAL TEXT

Database of actual text of cases and rulings,
proposed/passed legislation, for following topics:

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- Annuities
- Business continuation planning
- Charitable planning
- Corporate tax planning
- Creditor issues
- Estate, Gift & GSTT planning
- Insurance planning
- Financial planning
- Health and Long Term Care
- Qualified plans (IRA, 401(k))
- Partnerships / LLC's / S Corps
- Personal Income Tax planning
- Valuations
- Trusts



ACTUAL TEXT - DETAIL

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Actual Text of Cases, Rulings, Regulations and Legislation

		Latest Cases Rulings and Regulations	Pending and Recent Legislation		
Annuities	Business Continuation Planning	Charitable Planning	Corporate Tax Planning	Creditor Issues	Estate, Gift & GSTT Planning
Executive Compensation & Fringe Benefits	Financial Planning	Health Insurance & LTC	IRAs, 401(K), 403(b), 419	Life Insurance	Non Qualified Deferred Compensation
Partnerships / LLC's	Personal Income Tax Planning	Qualified Plans	S Corps	Statistics	Split Dollar
		Trusts	Valuation		



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LAW THREADS

Summarizes practitioners'
commentary on key planning issues.

- Edited and updated by attorneys, Law Threads is a very fast way to see what other practitioners are saying and thinking on selected hot topics, recent cases, or new law.
- Recent posting: 2016 Heckerling Institute Summaries



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JOURNALS

Provides recent magazine and journal sources to help you research more about a given topic.

- Search the database loaded with recent published commentaries giving you the Title, Author, Publication Date, and a brief Summary.
- Journals will help you reach the publisher to obtain reprints of an important article.



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JOURNALS - DETAIL

Journals

(Due to Copyright Restrictions, LISI is not able to provide Reprints of these articles)

Transferring Life Insurance and Related Receivables

Espen Robak - Trusts & Estates

Which Situs is Best in 2016?

Daniel G. Worthington and Mark Merric - Trusts & Estates

The State of the States: 2015

Sharon L. Klein - Trusts & Estates

Legal Underpinnings for Formulating (And Defending) Estate Plans

Conrad Teitell, Daniel G. Johnson and Katherine A. McAllister - Trusts & Estates

New Actuarial Guidelines Issued in 2015

Richard L. Harris - Trusts & Estates

An Eventful Year

Charles A. Redd - Trusts & Estates

Benefits for Seniors Reduced

Bernard A. Krooks - Trusts & Estates

A New Planning Environment

Gideon Rothschild - Trusts & Estates



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ENTITY RESOURCES

Corporation/LLC/Partnership section provides an incredible Question & Answer database of useful and practical information.

- **Written by the authors of relevant BNA publications.**
- Formation; contributions; distributions; liquidations; taxation; accounting methods; allocations; loss limits; sale/dispositions; inside vs. outside basis; eligible shareholders.
- **This is an invaluable resource on its own.**



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LLC/Partnership, Corporation Resources

C Corporations

[Dividends Received Deduction & Extraordinary Dividends](#)

[Formation](#)

[Contributions To Capital](#)

[Organizational Expenses](#)

[Character Of Loss On Sale/Worthlessness Of Stock](#)

[Nonliquidating Distributions](#)

[Stock Redemptions](#)

[Distribution of Stock & Stock Rights](#)

[Section 306 Stock](#)

[Complete Liquidations](#)

[Classification As A Corporation](#)

[Taxation As A C Corporation](#)

[AMT and C Corporations - Big vs. Small Rule](#)

[Current Earnings and Profits in a Loss Year](#)

Partnerships/LLCs

[Identification of Partnership](#)

[Contributed Property](#)

[Contribution of Debt](#)

[Contribution of Cash](#)

[Contributed Services](#)

[Liability Share](#)

[Amortization of Organizational Costs](#)

[Taxable Year](#)

[Accounting Method](#)

[Partnership-Level Operations & Pass-Through](#)

[Allocations](#)

[Partner-Partnership Transactions](#)

[Operating Distributions](#)

[Partial Liquidations](#)

[Sale/Disposition of Interest](#)

[Loss Limitations](#)

[Complete Liquidations/Retirement](#)

[Death of a Partner](#)



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C CORPORATION – FORMATION

QUESTION & ANSWER

C Corporations

Formation

Transfer of Cash- Gain or Loss Consequences

1. If a taxpayer transfers cash to a C corporation in exchange for stock in the corporation, does the taxpayer recognize any gain?

A: No. If a taxpayer transfers cash to a corporation in exchange for stock, the taxpayer has essentially “purchased” the stock and, therefore, the stock.

2. If a taxpayer transfers cash to a C corporation in exchange for stock in the corporation, does the corporation recognize any gain?

A: No. A corporation does not recognize gain (or loss) when it issues its own shares in exchange for cash or property.

Transfer of Property-Gain or Loss Consequences

1. If a taxpayer transfers appreciated property to a C corporation in exchange for stock in the corporation, does the taxpayer recognize gain?

A: When a taxpayer sells or exchanges appreciated property, the taxpayer “realizes” gain. The taxpayer is required to “recognize” that gain applicable to the transaction. In the context of a transfer of property to a corporation, no gain or loss is recognized on the transfer of property solely in exchange for stock of the corporation if the transferor or transferors are in control of the corporation immediately after the exchange.

2. Does the nonrecognition provision apply only to individual taxpayers?

A: No. The provision applies to transfers by individuals, trusts, estates, partnerships, associations, companies, or corporations.



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LINKS - SITES OUTSIDE LISI

Key websites at your fingertips.

- You can search for links by topic, alphabetically by name, or by the last entered.
- Accessible under each newsletter tab.
- Calculators: income tax; retirement planning; investment/financial planning; life expectancy; loan amortization; life insurance factors.
- Economic Charts : stock and bond indices; currency exchange; consumer price index.



IRS TAX TIPS

Practical information on tax planning.

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- Searchable archive of IRS related information.
- Cut and paste these public domain documents to your own website!
- This LISI section is not copyrighted so you can freely use without added permission.



CODE SEARCHER

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Quick and easy way to access the actual text
of Internal Revenue Code

The screenshot displays the 'Code Searcher' interface on the Leimberg Services website. The browser address bar shows the URL <http://www.leimbergservices.com/uscodeb.cfm>. The page features a navigation menu with links such as 'Leimberg Information Services', 'Webinars', 'Podcast Services', 'Data Net', 'Tax Research Sites', 'Useful Numbers', 'TDR AFR Rates', 'Calcs & Charts', 'Form Finder', 'IRS Tax Tips', 'Stover's Software & Books', 'Code Searcher', and 'Email & Account Info'. Below the navigation menu, there is a section for 'CLICK TABS BELOW FOR NEWSLETTER ARCHIVES' and 'SPECIAL SERVICES'. The main content area is titled 'Office of the Law Revision Counsel UNITED STATES CODE'. It includes a search bar with the text 'Search the United States Code' and a 'Search' button. Below the search bar, there is a 'Jump To:' section with input fields for 'Title' and 'Section', and a 'Go' button. A list of titles is displayed on the right side of the page, including 'Front Matter', 'Title 1—General Provisions', 'Title 2—The Congress', 'Title 3—The President', 'Title 4—Flag And Seal, Seat Of Government, And The States', 'Title 5—Government Organization And Employees; and Agencies', 'Title 6—Domestic Security', 'Title 7—Agriculture', 'Title 8—Aliens And Nationality', 'Title 9—Arbitration', 'Title 10—Armed Forces', 'Title 11—Bankruptcy; and Appendix', 'Title 12—Banks And Banking', 'Title 13—Census', 'Title 14—Coast Guard', and 'Title 15—Commerce And Trade'. The page also includes a 'Home' link and a 'Tell A Friend' button.



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SUPERSEARCHER

Perform searches that automatically include both LISI AND non-LISI archives.

- Easy to use, customized selection from a set of sites, including Ebia; Unclefed; Findlaw; ABAnet; Benefitslink; Google; elderlawanswers; Firstgov
- **Example : want information on Section 419 plans**
 - go to the SuperSearcher box and type in “Section 419”
 - everything written in ANY of the selected sites, as well as, Links, ActualText, LawThreads, and Journals, is at your disposal
 - includes practitioners’ comments about the topic
 - includes actual cases and rulings



SUPERSEARCHER - DETAIL

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LISI SuperSearcher



Search **SELECTED SITES BELOW** For:

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| <input checked="" type="checkbox"/> IRS.gov | <input checked="" type="checkbox"/> Findlaw.com | <input checked="" type="checkbox"/> Abanet.org |
| <input checked="" type="checkbox"/> Ebia.com | <input checked="" type="checkbox"/> Firstgov.gov | <input checked="" type="checkbox"/> Texasprobate.Master.com |
| <input checked="" type="checkbox"/> Unclefed.com | <input checked="" type="checkbox"/> elderlawanswers.com | <input checked="" type="checkbox"/> Benefitslink.com |
| <input checked="" type="checkbox"/> IRS Letter Rulings and
Chief Counsel
Announcements/Memoranda
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Include LISI Results

Search Now

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TAX RESEARCH SITES

To assist you with researching tax issues,
giving instant access to sites, including:

- Internal Revenue Code; Treasury Regulations
- Internal Revenue Rulings; Internal Revenue Manual
- Private Letter Rulings; Field Attorney Advice
- Tax Court, Circuit Court, and District Court Opinions
- CCH; RIA; BNA; Tax Analysts; Accountants World
- Tax Forms
- Forums and discussion groups
- Tax Law Blogs



TAX RESEARCH SITES - DETAIL

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TAX RESEARCH SITES

Primary Materials

- [Search the United States Code](#)
- [Federal Tax Regulations \(e-CFR\)\(Search Title 26\)](#)
- [Internal Revenue Code \(Cornell LII\)](#)
- [IRS Revenue Rulings \(from Taxlinks\)](#)
- [IRS Private Letter Rulings and other determinations](#)
- [Internal Revenue Manual](#)
- [IRS Actions on Decision \(AOD\)](#)
- [IRS Legal Advice Issued by Field Attorneys](#)
- [IRS Applicable Federal Rate Rulings](#)
- [IRS Publications and Notices](#)
- [IRS Internal Revenue Bulletins](#)
- [U.S. Tax Court Opinions](#)
- [U.S. Circuit Court and District Court Tax Opinions \(from Legalbitstream\)](#)
- [Search all Federal Tax Opinions \(from Legalbitstream\)](#)
- [Legislative information -- Library of Congress](#)

Tax News

- [Leimberg Information Services](#)
- [CCH Tax News](#)
- [RIA News](#)
- [BNA Recent Developments](#)
- [Tax Analysts Taxwire](#)
- [Accountants World](#)



PODCAST SERVICES

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ALL PODCASTS	Latest Cases Rulings and Regulations	Pending and Recent Legislation	Technology
Annuities	Business Continuation Planning	Charitable Planning	Corporate Tax Planning
Creditor Issues	Estate, Gift & GSTT Planning	Executive Compensation & Fringe Benefits	Financial Planning
Health Insurance & LTC	IRAs, 401(K), 403(b), 419	Life Insurance	Non Qualified Deferred Compensation
Partnerships / LLC's	Personal Income Tax Planning	Qualified Plans	S Corps
Statistics	Split Dollar	Trusts	Valuation



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BLOGWATCH

Instant access to latest thoughts of brightest minds in trusts, estates, taxes, charitable giving, and retirement planning.

BlogWatch January 20, 2016

Clinton Rolls Out Estate Tax Proposal

Wills, Trusts & Estates Prof Blog

14-Jan-16

Her proposal would push the maximum tax rate to 45% from the current 40% and reduce the exemption to \$3.5 million per person or \$7 million for a married couple.

Additional coverage: [Tax Prof Blog](#)

Asset Protection: The Year in Review

Forbes Personal Finance

12-Jan-16

"...asset protection planning is showing a substantial uptick, as is the proliferation of tax shelters. Most folks are back to making money, and worried about keeping what they have, whether from creditors or the tax man...". By Jay Adkisson.



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To Access
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through our
Estate Planning Council
Membership:



Follow EPC member login link

http://leimbergservices.com/naepc_access.cfm

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21-May-14 10:41 AM

EPC Member Login

Username

Password

Remember my password:

[Click if you forgot your password](#)

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ESTATE PLANNING COUNCIL MEMBERS CLICK HERE TO OBTAIN USERNAME AND PASSWORD.

Welcome!

You are on the NAEPC home page for LISI, Leimberg Information Services, Inc. LISI provides [Steve Leimberg's](#) ESTATE PLANNING newsletter, written by [Ronald D. Aucutt](#), [Jonathan Blattmachr](#), [Robert F. Collins](#), [Dan Evans](#), [Owen G. Fiore](#), [Alan S. Gassman](#), [L Paul Hood](#), [Jerry Kasner](#), [Michel Nelson](#), [Charles L. Ratner](#), [Howard M. Zaritsky](#), [Steven J. Oshins](#), [Robert Colvin](#) and myself, and our EMPLOYEE BENEFITS AND RETIREMENT PLANNING newsletter written by attorney [Natalie Choate](#), [Noel C. Ice](#), [John McFadden](#), [Robert S. Keebler](#), [Alvin D. Lurie](#), [Bruce D. Steiner](#), and [Ed Slott](#), our BUSINESS ENTITIES newsletter by Professors [Lisa Starczewski](#) and [James Edward Maule](#), our ASSET PROTECTION PLANNING newsletter by [Alexander A. Bove Jr.](#), [Gideon Rothschild](#), our Charitable Planning Newsletter by [Johnine Hays](#), [Larry Katzenstein](#), [Jerry J. McCoy](#), and [Bob LeClair?](#)s FINANCIAL PLANNING newsletter. LISI now also provides [LawThreads](#)® edited by [Andrew J. DeMaio](#), [Barry](#)

- What is Leimberg Information Services?
- Questions and Answers.
- How much does it cost?
- Benefits and Features.
- Subscribe Now.



The first time you log in, you will need to submit the form below to obtain your Username and Password

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The screenshot shows a web browser window displaying the registration page for Leimberg Information Services. The page header includes the company name, slogan "FAST, FRANK, INCISIVE ANALYSIS!", and a "Contact Us" link. The date and time are shown as 21-May-14 at 10:47 AM. The main content area is titled "EPC Member Login" and contains a form with fields for Username, Password, and a "Remember my password" checkbox. Below the login fields are links for "Click if you forgot your password" and "Sign up now for a full subscription including email newsletters". To the right of the login form, there is a paragraph of text explaining the registration process and a registration form with fields for Local Estate Planning Council, First Name, Last Name, Company, Address, City, State, Zip Code, Email, and Phone.

Leimberg Information Services Inc. **FAST, FRANK, INCISIVE ANALYSIS!** [Contact Us](#)
21-May-14 10:47 AM

EPC Member Login

Username
Password
Remember my password:

[Click if you forgot your password](#)

[Sign up now for a full subscription including email newsletters.](#)

If you are a member of an Estate Planning Council that is a member of the National Association of Estate Planners and Councils, you may complete the form below to obtain access to the Web area of Leimberg Information Services.

After completing and submitting the form below, your membership information will be verified and a username and password for LISI Web access will be sent to you via. email.

Local Estate Planning Council
First Name
Last Name
Company
Address
City
State
Zip Code
Email
Phone



If you forget your Username and Password: Simply follow the link below

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The screenshot shows a web browser window with the URL http://leimbergservices.com/naepc_access.cfm. The page header includes the Leimberg Information Services Inc. logo and the slogan "FAST, FRANK, INCISIVE ANALYSIS!". The main content area features a large blue link: "ESTATE PLANNING COUNCIL MEMBERS CLICK HERE TO OBTAIN USERNAME AND PASSWORD." Below this, there is a "Welcome!" message and a list of authors for various newsletters. On the left side, there is a login form with fields for "Username" and "Password", a "Remember my password" checkbox, and a "Login" button. Below the login form, there are two links: "Click if you forgot your password" and "Sign up now for a full subscription including email newsletters." A yellow arrow points from the text above to the "Click if you forgot your password" link.



Visit LISI daily to see what's
new and important!

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Questions?