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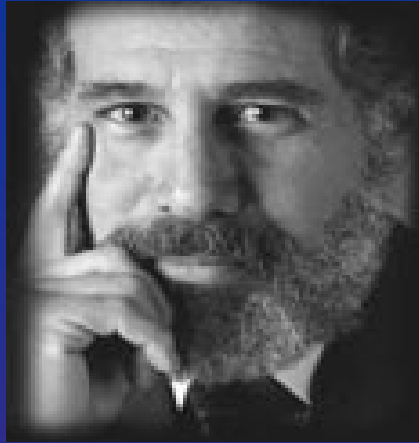
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LEIMBERG MEMBERSHIP BENEFITS

Estate Planning Council of Greater Miami

Has given you 24/7/360 access to an
incredible resource,

Leimberg Information Services, Inc. (LISI)



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Membership grants you:

access to hundreds of cases, rulings and legislation past and present posted throughout the year on an almost daily basis.

These commentaries are instantly accessible through LISI's incredibly powerful search engine that will allow members to create customized searches to locate specific topics, references, and citations of particular interest to them.



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

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- Newsletters
- Posts
- LawThreads
- FaxNet archives
- Journals
- Corporation and Partnership resources
- LISI's Links
- IRS Tax Tips
- CodeSearcher
- SuperSearcher
- Tax research site
- Podcasts
- Blog watch



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NEWSLETTERS

LISI'S NEWSLETTERS SECTION 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 to Friday, Commentaries on recent cases, rulings, and legislation are added to the Estate Planning, Employee Benefit and Retirement Planning, Business Entities, Asset Protection Planning, and Charitable Planning newsletters.



POSTS

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LISI POSTS, is an extensive “ActualText” database containing the actual text of hundreds of recent cases and rulings as well as proposed and recently passed legislation.

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LAWTHREADS

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LISI'S LAWTHREADS section summarizes and provides you with actual practitioners' commentary on key planning issues.

- Edited and updated by attorney, Andy De Maio, LawThreads is a very fast way to see what other practitioners are saying and thinking on selected hot topics, recent cases, or new law.



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JOURNALS

LISI'S JOURNALS section provides you with 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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PASSTHROUGH ENTITY RESOURCE

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**C CORP/S CORP/LLC/ PARTNERSHIP
RESOURCES** sections provide an incredible additional Q&A data base of useful and practical information available around the clock.

- Written by Lisa Starczewski and Jim Maule, who authored many of the BNA books in these areas and who are the co-creators of TaxCruncherPro™ sophisticated income tax planning software, you'll find this to be an invaluable resource on its own.

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LISI'S LINKS

LISI'S LINKS SYSTEM

Key web sites at your fingertips.

- You can search for links by topic, alphabetically by name, or by the last entered.

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IRS TAXTIPS

IRS TAXTIPS Archives almost daily practical information on income tax planning.

- Search and use the IRS Tax-Tips.
- Cut and paste these public domain documents on your own website! (This portion of LISI is not copyrighted so that you can use freely without permission.)

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CODESEARCHER

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CODESEARCHER A very quick and easy way to access the actual text of the Internal Revenue Code.

The screenshot displays the Leimberg Services website's Code Searcher interface. The browser address bar shows the URL <http://www.leimbergservices.com/uscode.htm>. The page features a navigation menu with tabs for Leimberg Information Services, Webinars, Podcast Services, Rate Net, Tax Research Sites, Useful Numbers, 2014 AFR Rates, Cabot & Charts, Form Finder, IRS Tax Tips, Steve's Software & Tools, Code Searcher, and Tax Under Construction & Account Info. Below the navigation is a section for "FAST, FRANK, INCISIVE ANALYSIS" with sub-tabs for Content Use, Weather, and Time. The main content area is titled "Office of the Law Revision Council UNITED STATES CODE" and includes a search box, a "Jump To:" section with "Title" and "Section" dropdowns, and a "Browse the United States Code" link. A sidebar on the right lists titles from 1 to 15, each with a "View" link. The Windows taskbar at the bottom shows the system tray with the date 6/13/2014 and time 10:42 AM.

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When you search LISI archives, you'll be automatically searching **OUTSIDE LISI** as well!

- VERY easy to use. Just log in, go to **SEARCH ARCHIVES**, and type in your request.
- For example, to search on 419 plans, just go to the **SEARCH ARCHIVES** box and type in 419. Everything ever written - in ANY of the six newsletters as well as and in ActualText, LawThreads, Journals, and Links is at your disposal. Includes what other practitioners have said about the topic as well as the actual case/ruling.

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TAX RESEARCH SITES

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Here, you'll find easy and instant access to The Internal Revenue Code, The Regulations, Rulings, and more to help you research tax issues.

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Provide audio information on various topics which can be heard right at your computer - or on the go though an iPod or other MP3 device.

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

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Brings LISI members instant access to the thoughts of some of the brightest minds in trusts, estates, taxes, charitable giving, and retirement planning.

Welcome to Leimberg Information Services Inc.  [CLICK HERE for the USER'S GUIDE](#)

Search archives for:

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

BlogWatch June 13, 2014

[US Supreme Court: Inherited IRAs Are Not Protected in Bankruptcy](#)
Forbes Personal Finance
12-Jun-14

"Most notably the decision has important ramifications for spouses...Unless she does the rollover, however, the account is considered an inherited IRA. She would not have to take any money out until her late spouse would have turned 70½. But under to

[Using Separate Accounts in Roth IRA Conversions](#)
Nerd's Eye View
11-Jun-14

"While the original purpose of the "separate account" rule for recharacterizations was likely just to isolate a new Roth conversion from existing Roth assets – per the preceding example – the rules also allow for a more proactive Roth conversion stra

[Study: POLST Form Protects Patient Wishes](#)
Daily News - Living
09-Jun-14

"When patients' end-of-life preferences are entered as instructions in their medical record, their wishes are more likely to be



Let's Get Started

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:
Login

[Click if you forgot your password](#)

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

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.](#)
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100% 10:41 AM 5/21/2014



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 with the URL http://leimbergservices.com/naepc_registration.cfm. The page header includes the Leimberg Information Services Inc. logo and the slogan "FAST, FRANK, INCISIVE ANALYSIS!". The main content area is titled "EPC Member Login" and contains the following text:

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.

The form includes the following fields:

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

Additional form elements include a "Username" field, a "Password" field, a "Remember my password:" checkbox (checked), a "Login" button, a "Click if you forgot your password" link, and a "Sign up now for a full subscription including email newsletters" link.

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

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The screenshot shows a web browser window displaying the Leimberg Information Services website. The browser's address bar shows the URL http://leimbergservices.com/naepc_access.cfm. The website header includes the Leimberg Information Services Inc. logo, a navigation menu (File, Edit, View, Favorites, Tools, Help), and a status bar showing the date (29-Jul-14) and time (10:00 AM). The main content area features a large blue banner with the text: "ESTATE PLANNING COUNCIL MEMBERS CLICK HERE TO OBTAIN USERNAME AND PASSWORD." Below this banner is a "Welcome!" message and a "Login" form. The login form includes fields for "Username" and "Password", a "Remember my password:" checkbox, and a "Login" button. A yellow arrow points from the text "Simply follow the link below" to the "Click if you forgot your password" link in the login form. The "Click if you forgot your password" link is highlighted in blue. Below the login form, there is a "Sign up now for a full subscription including email newsletters." link. The main content area also features a "Welcome!" message and a "What is Leimberg Information Services?" section with a list of links: "Questions and Answers", "How much does it cost?", "Benefits and Features", and "Subscribe Now". The website footer includes a Windows taskbar with various application icons and a system tray showing the date and time (10:01 AM 7/29/2014).

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

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Feel free to call Council Services with any
questions:

866-226-2224

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