

[Home](#) > [Plan Your Financial Future](#) > Chapter

Transfer Tax Planning and Management

| Chapter | First Online: 15 July 2013

| pp 167–180 | [Cite this chapter](#)

Plan Your Financial Future

[Keith R. Fevurly](#)

 1903 Accesses

Abstract

Once an individual has *accumulated* wealth, their motivations in the financial planning process turn to not only how to protect or defend this wealth, but also how to *distribute* it. For this reason, this chapter explains gifts and the advantages of making gifts in transfer-tax planning and management. Many individuals think that transfer tax (gift and estate tax) planning is only relevant for very high-net-worth taxpayers, but this is not really true. For example, did you know that you can give away \$14,000 per year, regardless of the amount of your net worth, to donees without having to file a federal gift tax return, IRS Form 709? Just as important, did you know that once you exceed this \$14,000 limit, you are *required by law* to file a federal gift tax return? Yes, you will also have to include Christmas gifts on that tax return if you have given away the full \$14,000 limit earlier in the same year.

Access this chapter

[Log in via an institution](#) →

Subscribe and save

Springer+

from €37.37 /Month

- Starting from 10 chapters or articles per month
- Access and download chapters and articles from more than 300k books and 2,500 journals
- Cancel anytime

[View plans](#) →

Buy Now

^ **Chapter**

EUR 29.95

Price includes VAT (Poland)

- Available as PDF
- Read on any device
- Instant download
- Own it forever

[Buy Chapter](#) →

^ **eBook**

EUR 36.99

Price includes VAT (Poland)

- Available as EPUB and PDF
- Read on any device
- Instant download
- Own it forever

[Buy eBook](#) →

Tax calculation will be finalised at checkout

Purchases are for personal use only

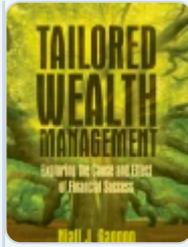
[Institutional subscriptions](#) →

Similar content being viewed by others



[Transfer-Tax Planning and Management](#)

Chapter | © 2018



[Gifting and Estate Planning: Determining the Right Time to Transfer Wealth](#)

Chapter | © 2019

[The Coming Tax Storm—Will There Be Massive Tax Hikes on Wealth Holders](#)

Chapter | © 2021

Explore related subjects

Discover the latest articles, books and news in related subjects, suggested using machine learning.

[Business Taxation and Tax Law](#)

[Family Business](#)

[Fiscal Law](#)

[Taxation Policy](#)

Author information

Authors and Affiliations

CO, USA

Keith R. Fevurly

Rights and permissions

[Reprints and permissions](#)

Copyright information

© 2013 Keith R. Fevurly

About this chapter

Cite this chapter

Fevurly, K.R. (2013). Transfer Tax Planning and Management. In: Plan Your Financial Future. Apress, Berkeley, CA. https://doi.org/10.1007/978-1-4302-6065-3_13

[.RIS↓](#) [.ENW↓](#) [.BIB↓](#)

DOI	Published	Publisher Name
https://doi.org/10.1007/978-1-4302-6065-3_13	15 July 2013	Apress, Berkeley, CA
Print ISBN	Online ISBN	eBook Packages
978-1-4302-6064-6	978-1-4302-6065-3	Business and Economics
		Apress Access Books
		Business and Management (R0)

Keywords

[Unify Credit](#)

[Fair Market](#)

[Gift Program](#)

[Vacation Home](#)

[Qualified Charity](#)

These keywords were added by machine and not by the authors. This process is experimental and the keywords may be updated as the learning algorithm improves.

Publish with us

[Policies and ethics](#) 

Search

Search by keyword or author



Navigation

Find a journal

Publish with us

Track your research

