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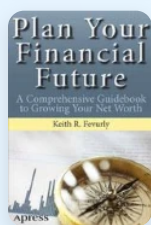
Transfer Tax Planning and Management

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Plan Your Financial Future


[Keith R. Fevurly](#)

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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.

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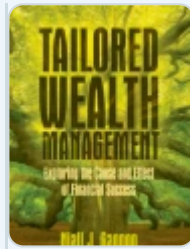
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Author information

Authors and Affiliations

CO, USA

Keith R. Fevurly

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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

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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
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