2014 Sales Guide

Book Title: 2015 Tax Facts on Investments
Pricing information for combos on separate handout

Pub Number:

Purchasing

FORMAT	Publication #	Orig. Price	New List Price
Book			
ONLINE			
eBook			

Summary

The definitive resource on tax implications for investments, the 2014 edition of *Tax Facts on Investments* incorporates all 2013 and previous federal tax developments impacting the areas covered. It is the single source for complete information on the taxation issues of investments. It includes sections on the taxation of stocks, options, futures, straddles, bonds, precious metals and collectibles, limited partnerships, S corporations, real estate and REITs, oil and gas, equipment leasing, cattle, financial institutions, mutual funds, unit trusts, reverse mortgages, and captive insurance companies. It also includes sections on charitable gifts and the deduction of interest and expenses.

Over 500 questions are devoted to various types of investments. All have been reviewed, enhanced, and updated to reflect current tax information. As part of our commitment to keep our customers current, substantive tax revisions that develop after the release date will be promptly posted at www.TaxFactsUpdates.com. Practice Pointers--written by practitioners for practitioners--are provided as an extra bonus throughout the text.

This volume was also reviewed for clarity, and dozens of questions were divided into separate subparts in order to provide clearer and more concise answers.

Key Selling Points

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* Completely updated to tax regulations/code as of August 2014
* Online supplement at www.TaxFactsUpdates.com will house substantive tax activity in the investments area that occur after that date, including critical changes that may result from the Fall presidential and congressional elections.
* Written by experts in the field who offer the most authoritative information available in the marketplace about this subject matter.
* Fully cited to legal authority to provide third-party credibility.
* Planning Pointers -- written by practitioners for practitioners -- provide important practical guidance.

Key Topics

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Covers tax issues affecting the following areas:

Stocks	Oil and Gas
Options	Equipment Leasing
Futures	Cattle
Straddles	Financial Institutions
Bonds	Mutual Funds and Unit Trusts
Precious Metals & Collectibles	Limitation on Loss Deductions
Limited Partnerships	Deduction of Interest & Expenses
S Corporations	Charitable Gifts
Real Estate, including REITs	Intellectual Property

What's New for 2014

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* Important federal income and estate tax developments impacting investments
* **Expanded** section on Real Estate Investment Trusts (5 new questions & answers, plus existing questions and answers reviewed & updated.)
* **Expanded** section on Reverse Mortgages (5 new questions & answers, plus existing questions and answers review and updated.)
* UpdatedTable of Internal Revenue code sections, regulations, and rulings referenced in print within the book.
* Every question and answer has been edited, clarified, simplified and revised.

Author(s)

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Robert Bloink, J.D., LL.M., an insurance industry expert who handles sophisticated wealth transfer techniques. Professor of tax for the Graduate Program of International Tax and Financial Services at Thomas Jefferson Law School, San Diego.

Key Selling Points

* Many of the lengthier questions have been divided into subparts for clarity and ease of use.
* Convenient Q&A format provides information that is user friendly.
* Supporting charts and tables in the appendices and online provide needed supplemental information.

Key Topics

Reverse Mortgages
Captives and Alternative Risk Arrangements
ETFs

What's New for 2014

* More than 15 new Planning Points, written by practitioners for practitioners, provide real life application ideas for many of the questions and answers. The areas where Planning Points have been added are:
    Real Estate & REITs
    Limited partnerships
    Limitations on Losses
    Charitable gifts
    Interest and expense

8. All appendices have been updated to August 2014.
9. Substantive tax changes will be posted at www.TaxFactsUpdates.com in order to provide our print customers with the most current information available.

Author(s)

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