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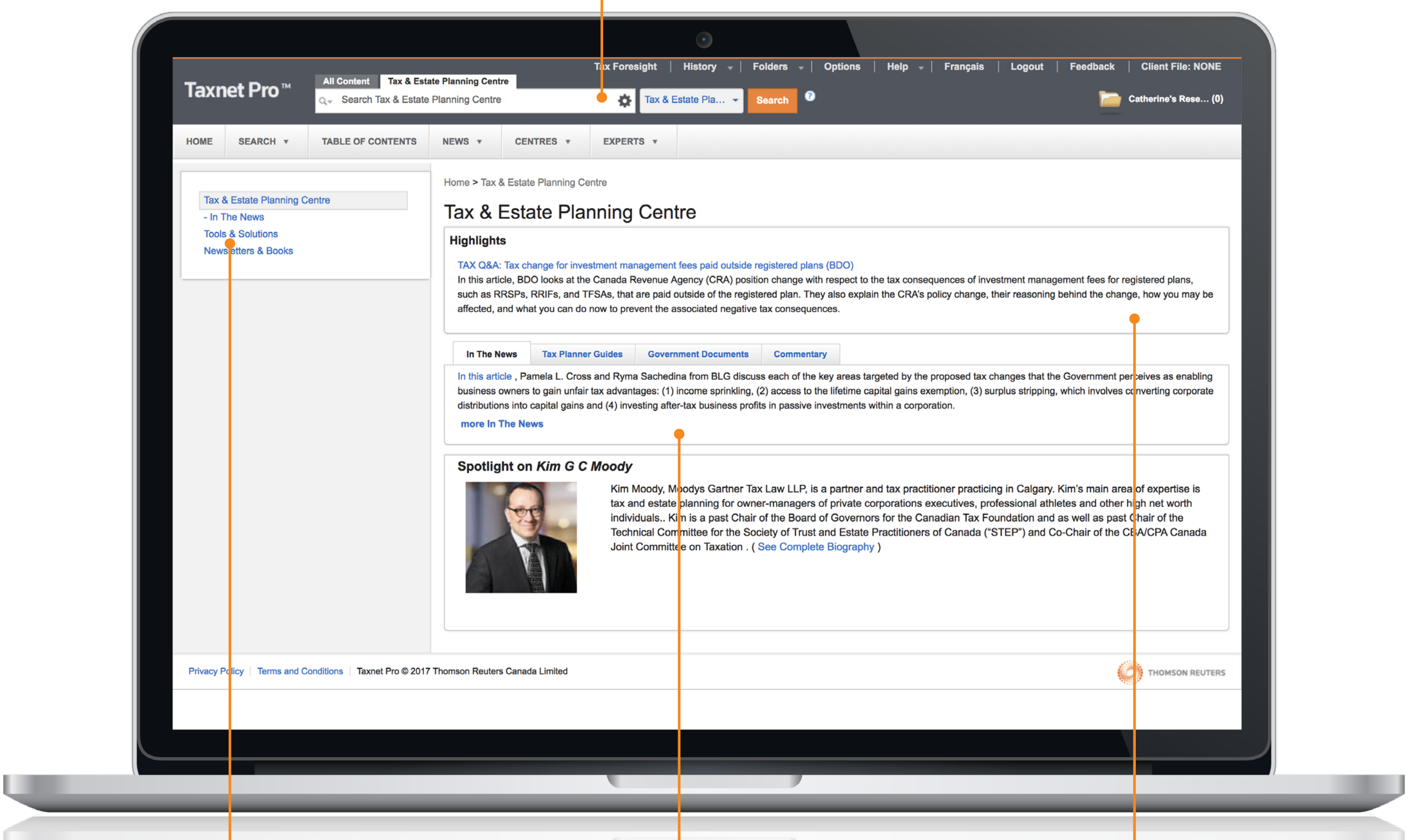
Get all the information for the answers you need in one place

Tax & Estate Planning Centre on Taxnet Pro™ is an online destination designed specifically for tax professionals who provide tax and estate planning services. You will find the latest information on all aspects of estate planning and related tax issues.

If you work in estate planning and tax, you'll find our leading industry experts provide the most comprehensive and authoritative information in this one convenient location. It gathers information from multiple sources and organizes it into a practical format to make it easier for users to find the answers they need.

Search tax and estate planning documents exclusively



Tools & Solutions includes more than 54 checklists, calculators, tables and fillable forms

Read the latest news in Tax & Estate Planning

Features key topics editorially selected

What’s in Tax & Estate Planning Centre?

- **Unique landing page** designed to enhance user experience and increase research productivity
- **Current awareness information** delivered as it happens through TaxNews and our Highlights
- **Powerful interactive tools** such as checklists, calculators and authoritative charts
- **Exclusive practical tax planner guides** written by leading industry experts
- **Tax Expert Directory** that allows users to evaluate their credentials and contact the experts directly for more information or clarification
- **Relevant government publications** and non-tax case law and legislation
- **Insightful CBA National Estate Administration Concordance**
- **Relevant non-tax Case law and legislation** necessary for the Tax Professional to provide estate planning and administrative services
- **Time-saving Quick Search** functionality that helps users find what they need quickly and efficiently, combined with quick access to Advanced Search templates for complex queries
- **Authoritative commentary and practical strategies** delivered through a variety of sources including:
  - Newsletters
    - Border Crossings (Pereira, KPMG)
    - Taxes & Wealth Management (Chodikoff, Rochwerg, Miller Thomson)
    - Privately Held Companies (Doobay, TaxChambers)
    - Ameri-Can Tax (Feigenbaum)
  - Articles on various estate-related issues from the Administration of Income Tax, 21-year Rule, Charities, Estate Freeze, Income Splitting, Kiddie Tax to U.S. Estate Tax
  - In depth publications such as Taxation and Estate Planning (Brown), Canadian Taxation of Life Insurance (Marino & Natale) and Taxation of Trusts and Estates (Chow & Pryor)
  - Case law and legislation relevant to tax professionals providing estate planning and administration services
- **More than 44 Checklists** related to tax-planning strategies, professional corporations, charitable giving strategies, financial planning needs, wills, family business succession, death of a taxpayer, retirement planning strategies, Executor’s Duties, Personal Tax Returns are updated regularly.

Exclusive Authoritative Commentary and Tax Insight

Exclusive authoritative commentary delivers answers to complicated research questions. Tax & Estate Planning Centre commentary provides greater depth and breadth of coverage than the competition.

Taxation and Estate Planning by Catherine A. Brown covers tax laws affecting estate planning and suggests techniques to manage tax consequences. The text includes in-depth analysis of areas such as taxation in the year of death, taxation of the estate, testamentary trusts and beneficiaries, will planning, gifts and trusts, estate freezing, buy/sell arrangements and international taxation, transfers as consequences of death, attribution rules and much more.

Practitioner's Guide to Trusts, Estates and Trust Returns by Grace Chow and Ian Pryor provides comprehensive commentary on tax and estate planning concepts and various types of trusts. Practical solutions and commentary are offered for each step involved in preparing the T3 Trust Income Tax and Information Returns and Schedules.

Canadian Taxation of Life Insurance by Florence Marino and John Natale of the Tax and Estate Planning Group, Manulife Financial covers the use of life insurance in estate and business planning contexts and the resulting tax consequences. It also covers the tax and accounting consequences in corporate, partnership and personal contexts. The tax consequences of common life insurance transactions such as transfers of ownership and other dispositions of a policy are also covered.

Tax Experts Directory and **Tax Experts Profile** help you evaluate the credentials of our expert authors. They also provide contact information so you can consult the expert directly for more information or clarification.

Non-tax Case Law and Legislation was requested by tax practitioners during our market research. Although estates and trusts is not an area of rapid change, tax practitioners must be aware of change as it occurs, including legislative amendments, changes in tax policy and case law developments. We have included the expertly selected non-tax case law and legislation necessary to provide estate planning and administration services.

Government Publications help practitioners save time from having to sift through thousands of CRA policy documents to find relevant information. Taxnet Pro also includes Treaties & Agreements are containing Foreign Account Tax Compliance Act (FATCA) Agreements; Social Security Agreements and Québec Social Security Agreements.

Articles written by recognized names in the profession are organized by topic. They cover various aspects of estate planning including recommendations for managing tax consequences.

Newsletters designed to keep you current and reduce the risk of incorrect advice:

- **Taxes and Wealth Management Newsletter**
  Editors Martin Rochwerg and David W. Chodikoff of Miller Thomson LLP changed the newsletter name to reflect our broadening content. "We are still primarily focused on matters that deal with taxes, estates and trusts. But, as we have demonstrated over the past two years, we are increasingly examining a wide range of subjects that impact private companies and high net worth individuals. We are not only focused on tax, estate and trust matters but on an ever broadening range of topics that relate to wealth management."

- **Border Crossings Newsletter**
  Written by Michael Pereira of KPMG and published four times a year, this newsletter offers insightful commentary on developments in international and cross-border estate and tax-related issues.

- **Ameri-Can Tax Talk Newsletter**
  Mark Feigenbaum provides insight into various cross-border taxation issues between the United States and Canada.

Workflow tools designed to increase efficiency and save time

Powerful interactive planning checklists, calendars, calculators, and authoritative charts designed to increase your productivity.

Checklists and Forms help ensure you've collected all relevant client information, you've considered alternative planning strategies, and you've used a consistent approach. The Tax & Estate Planning Centre includes 42 exclusive planning checklists not available in an interactive electronic format on other services. Checklists and forms can be downloaded, saved and updated as additional information is gathered.

The Tax & Estate Planning Centre also includes interactive and fillable versions of the CRA T3 Return with imbedded calculations that users can complete and save electronically. This allows more efficient use of time and reduces the risk of error when preparing CRA trust returns.

Checklists created for the tax practitioner:

- Personal and Family Data
- Prior Marriage Questionnaire
- Life Insurance Polices Schedule
- Disability Insurance Policies Schedule
- Long Term Care Insurance Polices Schedule
- Critical Illness Insurance Policies Schedule
- Estate Planning Data
- Vehicle Insurance Policies Schedule
- Medical / Dental Insurance Polices Schedule
- Additional Property / Liability Insurance Schedule
- Business / Practice Insurance Schedule
- Documents Requested Checklist
- Tax Planning Strategies Checklist
- Estate Planning Work Program
- Tax Calculation Worksheet
- Cash Requirements Worksheet
- Will Review Checklist
- Estate Administration Checklist
- Estate Planning Strategies Checklist
- General Duties of an Executor
- Testamentary Letter Checklist
- Charitable Giving Strategies Checklist
- Sample Letter Report – Estate Planning Engagement
- Financial Planning Needs Checklist
- Year-End Personal Tax Planning Checklist
- Goals Clarification Worksheet
- Estate Freeze Checklist
- Assets
- Decision-Making Worksheet
- Death of a Taxpayer Checklist
- Family Business Succession Planning Checklist
- Emigrating from Canada Checklist
- Professional Corporation Checklist
- Liabilities
- Life Insurance Needs Analysis Worksheet
- Annual Cash Flow Analysis Form
- Cash Flow
- Continuing Living Expenses
- Risk Management Planning Strategies Checklist
- Homeowners Insurance Policies Schedule (Principal and Other Residences)
- Retirement Planning Strategies Checklist
- Asset Management Planning Strategies Checklist
- Personal Tax Return Checklist
- Executor's Duties Checklists

Calculators save you time in finding formulas (Probate Fee Calculators) or counting days (Date Plus X Days and Days between Two Dates calculators) and running calculations, reducing the risk of manual errors. You can calculate fees owing on an estate and run scenarios to determine how to structure affairs to minimize fees. And by using the Date Plus X Days and Days between Two Dates calculators, your calculation will account for weekends and statutory holidays and you'll meet your tax filing deadlines.

Tables make it easy to compare data from across different Canadian provinces and territories. You'll save time and reduce the risk of error.

- **Canadian Probate Taxes Table** provides a comprehensive snapshot of probate fees payable in each province/territory.
- **CBA National Concordance of Estate Administration Tables** compare steps in Estate Administration in the provinces and territories. These have been created by the Canadian Bar Association.

Tax Planner Guides cover issues arising from other areas of law that impact estate planning. Each guide offers introductory level information for the non-expert, much like a beginner's guide. **Tax Planner Guides** make it easier to familiarize yourself with other topical areas, helping you provide accurate advice to your clients.

- Family Law
- The 21-Year Rule
- Gifts of Marketable Securities
- Business Succession Planning
- Registered Pension Plans
- Separate Insurance Trusts
- U.S. Estate Tax
- Post-Mortem Tax Planning and Tax Elections at Death
- The Tax on Split Income (the "Kiddie Tax")
- The Principal Residence Exemption
- Powers of Attorney
- U.S. Vacation Properties
- Personal Insurance Needs
- Business Insurance Needs
- Estate Freezes
- Related, Affiliated and Associated Rules
- Accountant—Client Privilege
- Pooled Registered Pension Plan
- Subsection 75(2)

Other Tools

- Personal Tax Compliance Calendar
- U.S. Personal Tax Compliance Calendar
- Medical Expense Tax Credit Quick Reference Table
- RRSP Tax Savings Calculator
- Personal Tax Charts
- Late-Filing Penalties and Interest Calculator
- Personal Tax Credits Quick Reference Table
- Personal Tax Deductions Quick Reference Table
- U.S. Filing Requirements Quick Reference Table
- U.S. Filing and Remitting Quick Reference Table
- U.S. Penalties Quick Reference Table

ADVANTAGE OVER OTHER RESEARCH SERVICES

		Taxnet Pro	Other Services
Comprehensive Tax Content	**Three comprehensive tax libraries**	Federal Income Tax, GST, and Provincial Tax – include all primary legislation, government documents, case law, and unsurpassed commentary.	No other service matches the extensiveness of commentary and level of integration.
	More in-depth Commentary	Taxnet Pro commentary contains more author and expert contributions from numerous sources including McCarthy Tétrault and other leading authors covering a wide variety of tax topics.	No other service offers the depth and breadth of commentary as Taxnet Pro.
	Specialty Destinations	Taxnet Pro has a greater capability of meeting the Tax Professionals' specific research needs. Seven powerful resources Corporate Tax Centre, Tax & Estate Planning Centre, Federated Press Centre, Tax Disputes & Resolution Centre, Customs & Excise Centre, Reference Centre and APFF Centre are specialty areas within Taxnet Pro that provide you with the information and solutions you need to make informed business decisions.	Not available on other services.
Ease of Use	**Visual Indicators**	Visual indicators help you keep track of work you have already done.	No other service has anything comparable to Taxnet Pro's visual indicators.
	Search	The Quick Search box at the top of every page allows you to choose how you want to search. You can search widely with a general search or conduct a very specific search using the Query Builder and selecting a content type.	This flexibility is not matched on other services.
Canada's Most Advanced Tax Search Engine	**Sort and Filter Results**	Lets you search broadly across all content and then sort by content type such as cases, statutes, and more. You can also narrow your list results by any applicable field.	No other service has this level of filtering capability.
	Query Builder	The Query Builder allows you to create complex queries quickly and easily. It is available throughout the site and when used will build the Boolean terms and connectors query for you.	No other service offers this unique functionality to help you simplify your search process.
	Search Templates	The search templates on Taxnet Pro provide a layer of granularity which allows you to focus in on just the documents you are interested in.	No other service facilitates your search through the use of search templates.
	Table of Contents	Table of Contents allows you to navigate through all of the content on Taxnet Pro. This is one of the more popular methods of searching as it allows you to see exactly where your hits occur. Navigation is made easy with the ability to limit your view to just those documents which contain hits.	Although other services have a Table of Contents, they only show you what is within your subscription. With Taxnet Pro, be confident that you're never missing a key document.
Finding Tools	**Cross References**	Not only does Taxnet Pro have the most cross references, with over six million, it is also the most easiest to use. With the ability to narrow your cross-references, search within them and preview any cross-reference document, we have created an efficient way to ensure yourself that no documents have been missed.	The document integration with other services is lacking in comparison and functionally resulting in the opportunity for missed documents.
Analyze and Organize More Efficiently	**Project Folders**	Allows you to drag-and-drop key documents and save copy with reference snippets into folders organized by issue, client, or topic, which puts all vital information in one place for quicker access later. With Taxnet Pro, you can also create nested folders for better organization of your research.	No other service compares to the integrated foldering capabilities available on Taxnet Pro.
	Copy with Reference	You can copy and paste text into your work product with all available references.	No other service offers this.

Tax doesn't stand still. Neither does Taxnet Pro™

Tax professionals rely on Taxnet Pro every day to understand complex information, make informed decisions and use knowledge more efficiently. Taxnet Pro delivers an unsurpassed selection of outstanding industry specific news, analysis and commentary to keep you current with important developments in the industry, and legislative changes that can impact your clients. You'll have confidence knowing you're drawing from the most accurate and reliable authority.

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- Federated Press Centre
- Tax & Estate Planning Centre
- Tax Disputes & Resolution Centre
- OECD Collection
- Reference Centre
- Compliance Guides

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