Advanced **Markets**

Planning with purpose: Insights that matter

Join us as we dive deep into the complexities and solutions that shape meaningful wealth transfer and protection — from sudden wealth to liquidity challenges and much more. Our new blog series, *The hidden layers of legacy: Navigating wealth with purpose and possibility*, offers valuable insights that can enrich your client discussions:

- The 100% "tax": Why sudden wealth can be more dangerous than the IRS
- The liquidity gap: Why wealth transfer needs more than just a will
- The basis trap: How to preserve step-up while planning for liquidity
- Hidden costs: The tax burden of qualified plans

Check out our timely update on survivorship planning in addition to our spotlight on endorsement split dollar arrangements.

- Two lives, one legacy: Understanding survivorship coverage
- Flexible executive benefits with more employer control: Endorsement split dollar

These blogs are designed to spark thoughtful conversations and smart planning.

Central Intelligence

Stay informed on important court rulings and legislative updates that can affect our industry. Each month, this publication summarizes topics that can directly impact your business. This issue includes:

- Second Circuit upholds Treasury rule denying SALT work-around
- Second Circuit rules tax filing deadline is nonjurisdictional, allowing for equitable tolling
- Administration agenda for IRS for 2025 released
- CTA litigation still alive in the Fifth Circuit

Read the latest

In case you missed it

Stay ahead: Tax law changes, estate planning resources & LTC insights
Unlock the Advanced Markets advantage with exclusive tools