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# Council

## Membership Benefits:

- Analysis by Leading Experts  
Of Hundreds of *New Cases, Rulings and Legislation*
- Access to Analysis of Thousands of  
*Prior Cases/Rulings/Legislation*
- 24/7/365 Use of LISI's incredibly powerful search  
engine



# LISI NEWSLETTERS

Fast, Frank, Incisive

*Analysis*

of

NEW Key Cases, Rulings, and Legislation.

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# MARKET REPORT

## Bob LeClair's Weekly Review/Analysis Of What's Going on in the Economy



# LISI ActualText

Extensive Database  
With Actual Text of  
Thousands of cases and rulings,  
Proposed and Recently Passed  
Legislation

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# LISI LAWTHREADS

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Summarizes  
practitioners'  
commentary on key planning issues.

(Find Out what other practitioners are saying and thinking  
on selected hot topics)



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# LISI Journals

## Notes on Latest Important Magazine/Journal/Blog Resources

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# LISI'S LINKS

Key web sites  
at your fingertips.

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# CODE SEARCHER

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## Access Actual Text of Internal Revenue Code.

Leimberg Information Services  
Webinars  
Podcast Services  
Data Net  
Tax Research Sites  
Useful Numbers  
7520 A  
AFR Rates  
Calcs & Charts  
Form Finder  
IRS Tax Tips  
Stover's Software & Books  
Code Searcher  
To Update Email & Account Info  
Time  
Tell A Friend

CLICK TABS BELOW FOR NEWSLETTER ARCHIVES  
FAST, FRANK, INCISIVE ANALYSIS  
Contact Us  
Weather  
SPECIAL SERVICES

Office of the Law Revision Counsel  
UNITED STATES CODE

Search & Browse  
Currency and Updating  
Classification Tables  
Popular Name Tool  
Other Tables and Tools  
Understanding the Code  
Positive Law Codification  
Editorial Reclassification  
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FDsys

The United States Code is a consolidation and codification by subject matter of the general and permanent laws of the United States. It is prepared by the Office of the Law Revision Counsel of the United States House of Representatives. For currency information, click [here](#).

Search the United States Code

Jump To: Title Section Go

Browse the United States Code [ Current change... ]

- Front Matter
- Title 1—General Provisions
- Title 2—The Congress
- Title 3—The President
- Title 4—Flag And Seal, Seat Of Government, And The States
- Title 5—Government Organization And Employees; and Appendix
- Title 6—Domestic Security
- Title 7—Agriculture
- Title 8—Aliens And Nationality
- Title 9—Arbitration
- Title 10—Armed Forces
- Title 11—Bankruptcy; and Appendix
- Title 12—Banks And Banking
- Title 13—Census
- Title 14—Coast Guard
- Title 15—Commerce And Trade

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# SUPERSEARCHER

Search LISI archives and  
Automatically  
Search OUTSIDE LISI as well!

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# LISI PODCASTS

Audio information  
at your computer  
or though iPod or other MP3 device.

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ALL PODCASTS	Latest Cases Rulings and Regulations	Pending and Recent Legislation	Technology
Annuities	Business Continuation Planning	Charitable Planning	Corporate Tax Planning
Creditor Issues	Estate, Gift & GSTT Planning	Executive Compensation & Fringe Benefits	Financial Planning
Health Insurance & LTC	IRAs, 401(K), 403(b), 419	Life Insurance	Non Qualified Deferred Compensation
Partnerships / LLC's	Personal Income Tax Planning	Qualified Plans	S Corps
Statistics	Split Dollar	Trusts	Valuation

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# LISI BLOGWATCH

Instant access to  
Latest Thoughts of  
brightest minds in  
trusts, estates, taxes, charitable giving, and  
retirement planning

Welcome to Leimberg Information Services Inc. [Calendar](#)  
[CLICK HERE for the USER'S GUIDE](#)  
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**BlogWatch June 13, 2014**

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[US Supreme Court: Inherited IRAs Are Not Protected in Bankruptcy](#)  
*Forbes Personal Finance*  
12-Jun-14

"Most notably the decision has important ramifications for spouses...Unless she does the rollover, however, the account is considered an inherited IRA. She would not have to take any money out until her late spouse would have turned 70½. But under to

---

[Using Separate Accounts in Roth IRA Conversions](#)  
*Nerd's Eye View*  
11-Jun-14

"While the original purpose of the "separate account" rule for recharacterizations was likely just to isolate a new Roth conversion from existing Roth assets – per the preceding example – the rules also allow for a more proactive Roth conversion stra

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[Study: POLST Form Protects Patient Wishes](#)  
*Daily News - Living*  
09-Jun-14

"When patients' end-of-life preferences are entered as instructions in their medical record, their wishes are more likely to be



**These and many other features  
of LISI membership  
Through Our Estate Planning Council  
Offers Unique and invaluable to your practice.**

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- Links
- IRS Tax Tips
- Code Searcher
- Super Searcher
- Tax research site
- Podcasts
- Blog watch

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**To Access  
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**(LISI)**

**Through  
Your**

**Estate Planning Council  
Membership:**



# Follow EPC member login link

## [http://leimbergservices.com/naepc\\_access.cfm](http://leimbergservices.com/naepc_access.cfm)

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The screenshot shows a web browser window displaying the Leimberg Information Services website. The address bar shows the URL [http://leimbergservices.com/naepc\\_access.cfm](http://leimbergservices.com/naepc_access.cfm). The page header includes the Leimberg logo and the text "FAST, FRANK, INCISIVE ANALYSIS!". The main content area features a "Welcome!" message and a list of newsletters. A sidebar on the left contains a "EPC Member Login" form with fields for Username and Password, a "Remember my password" checkbox, and a "Login" button. Below the login form are links for "Click if you forgot your password" and "Sign up now for a full subscription including email newsletters".

**Leimberg**  
Information Services Inc. **FAST, FRANK, INCISIVE ANALYSIS!** [Contact Us](#)  
21-May-14 10:41 AM

**EPC Member Login**

Username

Password

Remember my password:

[Click if you forgot your password](#)

[Sign up now for a full subscription including email newsletters.](#)

**ESTATE PLANNING COUNCIL MEMBERS CLICK HERE TO OBTAIN USERNAME AND PASSWORD.**

**Welcome!**

You are on the NAEPC home page for LISI, Leimberg Information Services, Inc. LISI provides [Steve Leimberg's](#) ESTATE PLANNING newsletter, written by [Ronald D. Aucutt](#), [Jonathan Blattmachr](#), [Robert F. Collins](#), [Dan Evans](#), [Owen G. Flore](#), [Alan S. Gassman](#), [L Paul Hood](#), [Jerry Kasner](#), [Michel Nelson](#), [Charles L. Ratner](#), [Howard M. Zaritsky](#), [Steven J. Oshins](#), [Robert Colvin](#) and myself, and our EMPLOYEE BENEFITS AND RETIREMENT PLANNING newsletter written by attorney [Natalie Choate](#), [Noel C. Ice](#), [John McFadden](#), [Robert S. Keebler](#), [Alvin D. Lurie](#), [Bruce D. Steiner](#), and [Ed Slott](#), our BUSINESS ENTITIES newsletter by Professors [Lisa Starczewski](#) and [James Edward Maule](#), our ASSET PROTECTION PLANNING newsletter by [Alexander A. Bove Jr.](#), [Gideon Rothschild](#), our Charitable Planning Newsletter by [Johnine Hays](#), [Larry Katzenstein](#), [Jerry J. McCoy](#), and [Bob LeClair](#)?s FINANCIAL PLANNING newsletter. LISI now also provides LawThreads® edited by Andrew J. DeMaio, Barry

- What is Leimberg Information Services?
- Questions and Answers.
- How much does it cost?
- Benefits and Features.
- Subscribe Now.





# The first time you log in, you will need to submit the form below to obtain your Username and Password

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21-May-14 10:47 AM

**EPC Member Login**

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Remember my password:

[Click if you forgot your password](#)

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If you are a member of an Estate Planning Council that is a member of the National Association of Estate Planners and Councils, you may complete the form below to obtain access to the Web area of Leimberg Information Services.

After completing and submitting the form below, your membership information will be verified and a username and password for LISI Web access will be sent to you via. email.

Local Estate Planning Council	<input type="text"/>
First Name	<input type="text"/>
Last Name	<input type="text"/>
Company	<input type="text"/>
Address	<input type="text"/>
City	<input type="text"/>
State	<input type="text"/>
Zip Code	<input type="text"/>
Email	<input type="text"/>
Phone	<input type="text"/>

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# If you forget your Username and Password: Simply follow the link below

The screenshot shows a web browser window with the URL [http://leimbergservices.com/naepc\\_access.cfm](http://leimbergservices.com/naepc_access.cfm). The page header includes the Leimberg Information Services logo and navigation links. The main content area features a login form on the left with fields for Username and Password, and a 'Forgot your password' link. The central text reads: **ESTATE PLANNING COUNCIL MEMBERS CLICK HERE TO OBTAIN USERNAME AND PASSWORD.** Below this is a 'Welcome!' message and a list of newsletters. The bottom of the browser window shows the Windows taskbar with various application icons and the system clock displaying 10:01 AM on 7/29/2014.

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# Visit LISI Every Day to see what's new and important!

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## Questions?

## Contact Council Services

Phone: 866-226-2224

EMail: [councilservices@naepc.org](mailto:councilservices@naepc.org)

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