

INSIGHTS + NEWS

Kristin Shirahama Writes “Plan Ahead for Potential Estate and Gift Tax Changes” for Rethinking65

MARCH 1, 2021

Rethinking65 has published “Plan Ahead for Potential Estate and Gift Tax Changes” by Kristin Shirahama. With this year already off to an eventful start, some clients may be gaining a “bonus year” to allow them to retool their gifting to minimize their taxable estates. Kristin Shirahama discusses why clients should be making these changes.

Over the years, individuals have created these GRATs to quickly chisel a boatload of assets out of their estates, gift gains to heirs tax-free, and enjoy regular annuity payments. For clients with significant wealth to protect, GRATs have provided “the best of all possible worlds” — but some potential changes may affect who finds them most beneficial in the future.

Continue reading “[Plan Ahead for Potential Estate and Gift Tax Changes](#)” on the *Rethinking65* website.