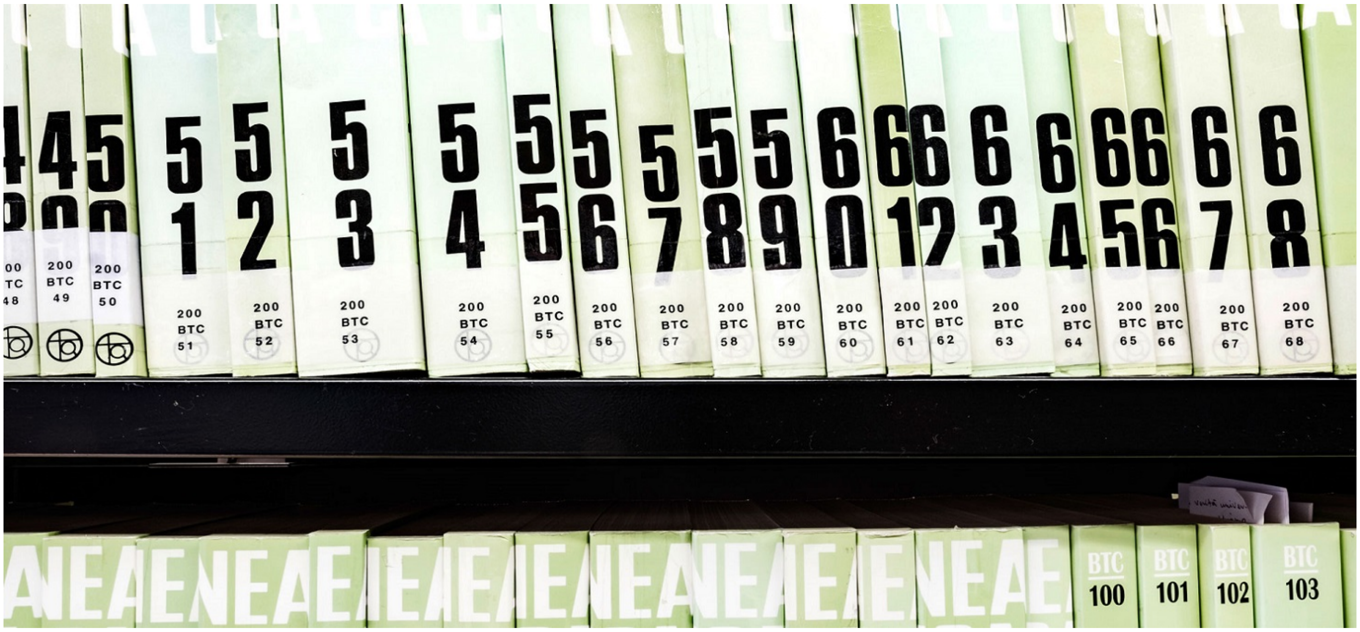

Here we list some ideas that the Advanced Planning Group suggest you should keep top of mind throughout the upcoming year. (UBS)

Top Ten Planning Topics for 2024

15 March 2024, 4:54 pm CET, written by UBS Editorial Team

As new laws become effective and old laws phase out, clients should be mindful how these changes may potentially impact their respective tax situations.

This new whitepaper, ***Top Ten Planning Topics for 2024*** serves as a complement to the new Advanced Planning Group's ***2024 guide***. In the whitepaper, Jennifer Lan and Premini Scandurra examine a number of concepts including income taxes, retirement planning, and estate planning.

Below are some ideas that the Advanced Planning Group suggest you should keep top of mind throughout the upcoming year.

1. Corporate Transparency Act
2. Sunset of lifetime exemption
3. Life insurance
4. Review core estate plan
5. Asset titling
6. Annual exclusion gifts
7. Sunset of certain income tax rates
8. Netting gains and losses
9. Roth conversions
10. Charitable deductions

CLICK HERE to see the full document, with detailed analysis of all 10 items.

There are a several other whitepapers on the Advanced Planning Group's site - **ubs.com/advancedplanning** – should you need additional resources.

CLICK HERE to explore the full 2024 Planning Guide.

About the Advanced Planning Group

The Advanced Planning Group consists of former practicing estate planning and tax attorneys with extensive private practice experience and diverse areas of specialization, including estate planning strategies, income and transfer tax planning, family office structuring, business succession planning, charitable planning and family governance.

The Advanced Planning Group provides comprehensive planning and sophisticated advice and education to ultra high net worth (UHNW) clients of the firm. The Advanced Planning Group also serves as a think tank for the firm, providing thought leadership and creating a robust intellectual capital library on estate planning, tax and related topics of interest to UHNW families.

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