
From: g <[REDACTED]>
Sent: Sunday, March 15, 2015 2:50 PM
To: 'jeffrey E.'
Subject: RE: Answer to the question you posed yesterday...

Couldn't they "purchase" the stock to avoid the gift tax?

From:=/b> =effrey E. [mailto:jeevacation@gmail.com]
Sent: Sunday, March =5, 2015 10:48 AM
To: g
Subject: Re: Answer to the =uestion you posed yesterday...

the =onsideration would have to be to gift tax. you could not gift =our son the value of over 5million . without paying 60 percent of the =transfer value at the moment of transfer.. your wife could =et it, but you would never be able to get it back if she decided to =eave you

On Sun, =ar 15, 2015 at 10:09 AM, g <[REDACTED]>=rote:

Jeffrey,

<=o:p>

Attached =re my thoughts from the question you posed to me =esterday.

<=o:p>

Obviously =his will not work for all your clients, but maybe a few could benefit =rom the idea.

I would =ove your feedback.

<=o:p>

Good =alking with you yesterday.

<=o:p>

See you =oon.

<=o:p>

Gerry<=/:p>

-- =o:p>

please =ote

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