
From: jeffrey E. <jeevacation@gmail.com>
Sent: Sunday, March 15, 2015 2:53 PM
To: g
Subject: Re: Answer to the question you posed yesterday...

they would have to have real funds. a note from a family member is difficult

On Sun, Mar 15, 2015 at 10:49 AM, [REDACTED]
[REDACTED] > wrote:

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

From: jeffrey E. [mailto:jeevacation@gmail.co=]
Sent: Sunday, March 15, 2015 10:48 AM
To: g
=b>Subject: Re: Answer to the question you posed yesterday...=/u>

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

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On Sun, Mar 15, 2015 at 10:09 AM [REDACTED] > wrote:

Jeffrey,

Attached are my thoughts from the question you pose to me yesterday.

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Obviously this will not work for all your clients, but maybe a few could benefit from the idea.

I would love your feedback.

Good talking with you yesterday.

=/p>

See you soon.

Gerry

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=C2◆ please note

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◆=A0 please note

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