
From: jeffrey E. <jeevacation@gmail.com>
Sent: Thursday, April 13, 2017 2:08 PM
To: Thomas Turrin
Subject: Re: gift tax

is judy balck irrevocable?

On Thu, Apr 13, 2017 at 9:47 AM, Thomas=Turrin <[REDACTED]> <mailto:[REDACTED]> > wrote:

Both trusts are irrevocable trusts and they are grantor trusts.

Whenever you make a gift to an irrevocable trust (whether a grantor trust or not),
you must attach the trust document to the gift tax return in the year a
gift is made to that trust. A gift to an irrevocable trust is a
"completed gift" (and therefore reported on gift tax return).

From: jeffrey E. [mailto:jeevacation@gmail.com <mailto:jeevacation@gmail.com>]
Sent: Thursday, April 13, 2017 9:44 AM
To: Thomas Turrin
Subject: Re: gift tax

so why do grantor trust need to be attached to return

On Thu, Apr 13, 2017 at 9:42 AM, Thomas Turrin <[REDACTED]> <mailto:[REDACTED]> > wrote:

yes, both are grantor trusts

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From: jeffrey =. [mailto:jeeva=ation@gmail.com <mailto:jeevacation@gmail.com>]
Sent: Thursday, April 13, 2017 9:33 AM
To: Thomas Turrin
Subject: Re: gift tax

it is a grantor trust?

On Thu, Apr 13, 2017 at 8:59 AM, Thomas Turrin <= href="mailto: [REDACTED]" target="_blank"> [REDACTED] </=> wrote:

Trust docs get attached each and every year when gift made to
a particular trust, =A0....otherwise it's considered an incomplete filing.=u>

</=>

From: jeffrey =. [mailto:jeeva=ation@gmail.com <mailto:jeevacation@gmail.com>]
Sent: Thursday, April 13, 2017 8:57 AM
To: Thomas Turrin
Subject: Re: gift tax

are you required to send the trust doc each ye=r? or can we add trust docs already sent

On Thu, Apr 13, 2017 at 8:35 AM, Thomas Turrin <= href="mailto: [REDACTED]" target="_blank"> [REDACTED] </=> wrote:

Jeffrey,

The password is in next email.

I have the gift tax return ready to go.

I had sent the draft on March 8th. =C2 Attached

is the final version with trusts attached.

If you have any questions, let me know.

Thanks,

Tom

THOMAS TURRIN, CPA

Partner

Raich Ende Malter & Co. LLP

1375 Broadway

New York, New York 10018

[REDACTED] <tel:[REDACTED]>

[REDACTED] <tel:[REDACTED]> (Direct line)<=>

[REDACTED] <tel:[REDACTED]> (Fax)

[REDACTED] <tel:[REDACTED]> (Cell)<=>

Email: [REDACTED] <mailto:[REDACTED]>

Website: <http://www.rem-co.com/> <<http://www.rem-co.com/>>

From: Thomas Turrin

Sent: Wednesday, March 08, 2017 1:55 PM

To: 'jeffrey E.'

Subject: Draft - gift tax

Jeffrey,

Draft of gift tax return attached. Passw=rd in next email.

I reconciled the trust bank account for 2016. =C2 What is reported on the gift tax return is the gift to the t=ust.

Per the family office, there were no new GRATS in 20=6.

Let me know if you have any questions.=/p>

Tom

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please no=e

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