



# Income Tax Planning and Compliance

Chapman and Cutler LLP attorneys counsel executors, trustees, beneficiaries and individual clients on a multiplicity of income tax issues that arise during the course of administering decedents' estates and trusts. We advise our clients on the income tax consequences of their estate plan, identify opportunities for income tax planning and prepare fiduciary and individual federal and state income tax returns.

**We frequently advise clients on permissible strategies to reduce aggregate income taxes.**

Our group practitioners offer quality and efficient income tax planning services. Given our extensive experience in fiduciary and individual income tax planning and reporting, we can effectively anticipate and address income tax issues throughout an individual's lifetime and throughout the course of the administration of a decedent's estate or trust.

For example, we advise clients on strategies relating to alternative minimum tax, charitable income tax deductions and the income tax consequences of executive stock options. Additionally, we are experienced advocates in the representation of individuals, estates, trusts and beneficiaries in the area of federal and state audits of income tax returns.

## Publications

- Wallenfelsz, Rebecca (co-author): "Transfers from Abroad," *Trusts and Estates*, December 2004.

## Attorneys

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## Related Practices

Business Succession Planning  
Charitable Planning  
Estate and Gift Planning  
Estate and Trust Administration  
Fiduciary Litigation  
Trust Counsel Services  
Trusts and Estates