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Estate, Tax, and Personal Financial Planning

By Edward F. Koren, updated by Gregory Evanella

Enclosed is the 2026-2 update to *Estate, Tax, and Personal Financial Planning*, which updates recent estate and tax law developments.

This year we are providing you with all new contents of the treatise. Volumes 1, 2, and 3 of the four-volume set have been converted into a soft-cover pamphlet format. For the remainder of the yearly quarterly updates, subscribers will receive a pamphlet or pamphlets (as needed) to replace any relevant revised content within the respective volumes. This should greatly improve the reader's experience in terms of filing pages within a limited binder system—allowing the work to easily expand as needed. Though the format is changing, customers are not being charged more for this format change. Subscribers will pay the same overall price that they would have been charged during the course of the year.

This important work continues to provide a detailed reference covering the laws of wills, trusts, and the various taxes that affect lifetime and testamentary transfers.

This 2026-2 enclosure replaces the prior 2026-1 update. Please note that, for ease of handling, the materials in this shipment may ship in more than one box.

Filing Instructions

REMOVE and RECYCLE the Volumes 1 through 3 of the treatise set (binders and contents). *Please note that subscribers to the set may retain the Volume 4 binder for use in storing and organizing your monthly newsletters.*

PLACE the new 2026-2 pamphlet edition (volumes 1 to 3) in your library.

Highlights

New features and recent developments in this 2026-2 update include:

- Revised Chapter 18 (Preparation of Wills)

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