

Important: Filing/Shelving Instructions or Shipment Insert

Estate, Tax, and Personal Financial Planning

By Edward F. Koren, updated by Gregory Evanella

Enclosed is the 2026-1 update to Estate, Tax, and Personal Financial Planning, which updates recent estate and tax law developments. This enclosure replaces the prior 2025-1 update. Please note that, for ease of handling, the materials in this shipment may ship in more than one box.

Shelving Instructions

See separate filing instructions pages included with this release.

Highlights

New features and recent developments in this 2026-1 update include:

- 2026 inflation adjustments throughout the set.
- Updated IRS forms and instructions.

Contact Us

Thomson Reuters thanks you for subscribing to this product. Should you have any questions regarding this product, contact Customer Service at 1-800-328-4880 or by fax at 1-800-340-9378. If you would like to inquire about related publications, or wish to place an order, please contact us at 1-800-328-9352.



Thomson Reuters™

Thomson Reuters
610 Opperman Drive
Eagan, MN 55123

legal.thomsonreuters.com

Estate, Tax, and Personal Financial Planning by Edward F. Koren and Karen T. Schiele

Filing Instructions

Special Note: Before filing this release make sure your volume is up to date. If the title page of your volume contains the code (Rel. 1, 3/2025), your volume is up to date; follow the filing instructions below. If you do not see this code, please contact Customer Service (phone: 1-800-328-4880, fax: 1-800-340-9378) for updating assistance before filing this release.

Remove Pages:

Insert New Pages:

Volume 1

Title Page to xvi	Title Page to xvi
Contents-1 to Contents-65	Contents-1 to Contents-65
1-1 to 1-18	1-1 to 1-18
1-45 to 1-46	1-45 to 1-46
1-61 to 1-66	1-61 to 1-66
2-1 to 2-10	2-1 to 2-10.1
2-43 to 2-48	2-43 to 2-48
2-121 to 2-164	2-121 to 2-164
2-191 to 2-192	2-191 to 2-192
3-27 to 3-42	3-27 to 3-42
3-113 to 3-116	3-113 to 3-116
3-155 to 3-180	3-155 to 3-180
4-3 to 4-6	4-3 to 4-6
4-29 to 4-34	4-29 to 4-34.1
4-59 to 4-62	4-59 to 4-62
4-77 to 4-79	4-77 to 4-79
5-1 to 5-202	5-1 to 5-202
6-73 to 6-74	6-73 to 6-74
8-1 to 8-106	8-1 to 8-106
9-11 to 9-54	9-1 to 9-54
10-1 to 10-2	10-1 to 10-2

For Customer Assistance Call 1-800-328-4880

<https://legal.thomsonreuters.com/>

Remove Pages:

Insert New Pages:

10-51 to 10-52 10-51 to 10-52
11-1 to 11-2 11-1 to 11-2
12-1 to 12-357 12-1 to 12-362

Volume 2

Title Page to Copyright Page Title Page to Copyright Page
Contents-1 to Contents-17 Contents-1 to Contents-17
13-1 to 13-50 13-1 to 13-50
14-1 to 14-28 14-1 to 14-28
15-1 to 15-52 15-1 to 15-52
16-1 to 16-226 16-1 to 16-227
17-1 to 17-4 17-1 to 17-4
17-25 to 17-30 17-25 to 17-30.1
17-45 to 17-84 17-45 to 17-84.1
19-1 to 19-186 19-1 to 19-186
21-5 to 21-16 21-5 to 21-16
21-73 to 21-74 21-73 to 21-74
21-89 to 21-90 21-89 to 21-90
22-19 to 22-20 22-19 to 22-20
22-41 to 22-70 22-41 to 22-70
23-1 to 23-102 23-1 to 23-102

Volume 3

Title Page to Copyright Page Title Page to Copyright Page
Contents-1 to Contents-17 Contents-1 to Contents-17
25-1 to 25-32 25-1 to 25-32
26-25 to 26-26 26-25 to 26-26.1
26-41 to 26-46 26-41 to 26-46
26-57 to 26-58 26-57 to 26-58.1
26-133 to 26-136 26-133 to 26-136.1
27-1 to 27-10 27-1 to 27-10.2
28-1 to 28-87 28-1 to 28-87
29-1 to 29-6 29-1 to 29-6.1
30-25 to 30-26 30-25 to 30-26
31-1 to 31-8 31-1 to 31-8.2
31-19 to 31-20 31-19 to 31-20
31-39 to 31-46 31-39 to 31-46.1
31-67 to 31-68 31-67 to 31-68
32-1 to 32-6 32-1 to 32-6.1
32-19 to 32-20 32-19 to 32-20
33-23 to 33-30 33-23 to 33-30
33-53 to 33-82.1 33-53 to 33-82.1
33-97 to 33-98 33-97 to 33-98

Volume 4

Title Page to Copyright Page Title Page to Copyright Page

Remove Pages:

Insert New Pages:

Contents-1 to Contents-11	Contents-1 to Contents-11
34-1 to 34-6	34-1 to 34-6
34-23 to 34-24	34-23 to 34-24
34-41 to 34-122	34-41 to 34-122.13
34-139 to 34-170	34-139 to 34-170.5
34-207 to 34-218	34-207 to 34-218
34-255 to 34-360	34-255 to 34-360.18
35-1 to 35-16	35-1 to 35-16
35-21 to 35-24	35-21 to 35-24
35-27 to 35-34	35-27 to 35-34
35-37 to 35-38	35-37 to 35-38
35-41 to 35-46	35-41 to 35-46
35-57 to 35-62	35-57 to 35-62
35-65 to 35-70	35-65 to 35-70
35-79 to 35-82	35-79 to 35-82
35-91 to 35-98	35-91 to 35-98
35-101 to 35-115	35-101 to 35-115
36-1 to 36-6	36-1 to 36-6.1
36-23 to 36-26	36-23 to 36-26
37-1 to 37-60	37-1 to 37-60
38-1 to 38-20	38-1 to 38-20.3
39-1 to 39-2	39-1 to 39-2
39-97 to 39-98	39-97 to 39-98
39-147 to 39-150	39-147 to 39-150

TABLES

Tbl of L&R-1 to Tbl of L&R-161	Tbl of L&R-1 to Tbl of L&R-161
Tbl of Cases-1 to Tbl of Cases-155	Tbl of Cases-1 to Tbl of Cases-155

INDEX

Index to Text-1 to Index to Text-155	Index to Text-1 to Index to Text-155
--	---

MONTHLY UPDATES

March 2025 to July 2026 Cumulative List of Recent Developments Pages	—
March 2025 to July 2026 Recent Developments Pages	—

You may receive some blank pages, this is a normal by-product of the printing process. Any blank pages may be recycled.