2026-2027 Release Highlights

Harris 6th New York Estates: Estate Planning and Taxation examines all aspects of estate planning, from the clients' first call through drafting, defense, and administration of wills and trusts, to final accounting. Also covered are the tax aspects of estate planning, including methods for minimizing federal estate and gift taxes; the pros and cons of living trusts; charitable planning; and lifetime gifts.

New features and recent developments in this 2026-2027 release include:

- Medicaid resource limitations numerical update.
- Discussion of NY "transfer on death" deed.
- Discussion of the final regulations of the SECURE ACT.
- Discussion of Chief Counsel Advisory 202352018.