**POTENTIAL 2016 TAX FACTS REVIEW**

**TAX FACTS I TAX FACTS IV**

Life Insurance- Blanton Non- taxable Exchanges- Katz

Health Insurance- Martin Business Succession Planning- Ellis

Long-Term Care Insurance-Forman Charitable Giving- Hays

Annuities-Olsen Small Employer Mandate- Bloink

Federal Income Taxation- Katz

International Tax- Byrnes

**TAX FACTS II**

Compensation

Deferred Compensation

Individual Retirement Plans- McKay

Pension and Profit Sharing- Richey

Roll Over-McKay

Tax Sheltered Annuities- Tough

Welfare Benefit Funds- Tough?

**TAX FACTS III**

Mutual Funds, Unit Trusts, REITS - Katz

Deduction of interest and expenses-Katz

Charitable Gifts-Hays

Reverse Mortgages

Cancellation of Debt (New)- Katz

Intellectual Property- Hodges