

Estate & Gift Tax
Prof. Jack Bogdanski
Fall 2023
Required Books

IMPORTANT NOTE: The final exam in this course will be a *secure exam*. Students will not have access to the internet or to files on their computers, including access to electronic versions of any books. The exam will be “open book, open note,” but only hard copies of materials may be used. The exam will also be a scheduled exam, which could make borrowing hard copies of materials difficult.

1. McDaniel, Repetti & Caron, *Federal Wealth Transfer Taxation* (7th ed. 2015). Student update memo (free) to be handed out.
2. Lathrope (ed.), *2024 edition or 2023 edition, Selected Federal Taxation Statutes and Regulations*.

Do not attempt to use older editions of either of the books, as they are out-of-date and therefore potentially confusing!