



POLICY AND TAXATION GROUP

Mission and Approach

Policy and Taxation Group, (PATG) is dedicated to the ultimate repeal of estate gift and generation-skipping transfer (GST) taxes, and the elimination of the destructive effect those taxes have on families, family businesses, job creation, the national economy, and government revenues. Since 1995, PATG has been a highly effective voice of families and family enterprises in the fight against the estate tax. Providing research, polling, expertise, and employing effective lobbying strategies. PATG is the only organization exclusively dedicated to the repeal of the gift tax, estate tax and generation skipping tax. PATG is:

- **Focused** - exclusively promotes the reduction and ultimate repeal of estate, gift, and generation-skipping taxes.
- **Strategic** - tactically and credibly engages and educates legislators in a bipartisan manner and motivates and organizes allies in the fight.
- **Innovative** - develops data, research, and information, with polls, focus groups, researchers, and academics to substantiate the need for repeal.
- **Organized** - is a 501(c)(4), supported exclusively by families and family businesses.

As a tax-exempt 501(c)(4) organization, PATG remains the best way for families to support and affect the direction of the movement for estate tax relief. PATG provides Support Families with a package of benefits that includes the communication of timely information related to the prospects of legislative changes to the estate tax law through regular email updates, conference calls, webinars, Washington DC Hill meetings with legislators and PATG Board members, and invitations to speaking engagements at which current tax law information is presented.



Impact and Focus

Singularly focused on providing relief and repeal from the estate tax, PATG has been the loudest voice in the nation's capital on eliminating the estate tax. This form of double taxation at death has a destructive impact on families, family businesses, job creation, and the national economy. PATG is a 501(c)(4) organization comprised solely of families directly or indirectly impacted by this harmful tax. Your support is being sought to invest in our strategic efforts to promote both short-term and long-term relief on Capitol Hill, to defeat harmful tax increases and provide practical leadership in the repeal/relief community.



Get Involved

Policy and Taxation Group is the best way for families, family businesses and individuals to support and impact estate tax relief/ repeal. The "Death Tax", (gift, estate and GST tax), affects many more people than in the IRS statistic's, as family business are sold, and jobs eliminated in anticipation of paying the estate tax. There is much at stake, and so now is the time to invest in the effort and work of PATG. Please let your voice be heard by joining Policy and Taxation Group and help families, their businesses, and their employees continue to thrive in the US.

What Has Been Accomplished

Advocacy: PATG's only focus is to work for repeal of the gift tax, estate tax and generation skipping tax by meeting with legislators and staff, the Executive Branch and Agencies on a constant and regular basis.

In 2020, PATG worked with Congressman Arrington to introduce HR5652, "The Estate Tax Rate Reduction Act", which would reduce the rate of the estate tax from 40% to 20%.

In 2019, PATG assisted Senators Cotton and Bozeman in the introduction of S176 which reduced the rate of estate tax to that of capital gains; 20%.

In 2018, PATG worked with Senator Kyl to introduce S3638 which reduced the rate of estate tax from 40% to 20%.

In 2017, PATG was instrumental in securing a doubling of the lifetime exemption for gift tax, estate tax, and generation skipping tax to that of \$11.2 million per person and \$22.4 million per couple.

In 2016, PATG was the only organization to bring family businesses to a Hearing held at the Treasury on proposed 2704 regulations, which would have eliminated valuation discounts for family related companies. This resulted in the proposed regulations being "withdrawn" and secured valuation discounts for all families.

In 2015, PATG helped to secure the first stand-alone vote for repeal legislation in the House of Representatives in a decade, in a bill that passed the House by a 240-179 bipartisan vote.

In 2012, PATG marshaled bipartisan support to defeat a confiscatory 55 percent rate, lowering the rate to 40% with NO expiration date, providing permanency of the estate tax law for the first time in decades.

In 2010, PATG led successful efforts to secure the lowest applicable rate of estate tax in more than 80 years.

