



POLICY AND TAXATION GROUP

Advocating on behalf of multigenerational businesses, and families to favorably influence legislation.

STRATEGIC

Engages Congress and the Executive Branch to raise awareness of relevant tax issues.

FOCUSED

Educating about the value of family businesses as economic drivers, job creators, community and charitable supporters who promote the national economy and significantly contribute to government revenues.

EXPERTISE, research, and polling to shape the public policy discourse.

BENEFITS

Supporters receive regular updates, insider information, critical situation awareness and a platform to decision makers.

EFFECTIVE

For over 25 years, PATG has been a highly effective voice in the fight against adverse taxes and has generated numerous legislative wins.



Policy and Taxation Group is the leading information, education and advocacy organization working for the reduction and ultimate elimination of estate, gift, and generation skipping transfer taxes, and other taxes that punish hard work and success. Our Mission is to challenge hostile tax policies that meaningfully and measurably impact families and limit the ability of family businesses to remain family owned.

**Your Voice in Washington, DC
Since 1995**

Support at
policyandtaxationgroup.com

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WHAT HAS BEEN ACCOMPLISHED

In 2021, PATG battled to prevent sweeping, historic tax increases in the Build Back Better and Infrastructure Bills that would have negatively impacted grantor trusts, eliminated valuation discounts, reduced the unified credit, and change the 199A deduction in its current form.

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.

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