



POLICY AND TAXATION GROUP

The best way for Family Offices
& Successful Individuals to
have a meaningful impact and
to stop hostile tax policy.

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 Voice
of Family Offices and Successful
Individuals in Washington, DC, focused
exclusively on the Tax and Economic
Issues that impact them.**

**Since 1995, PATG has been the leading
advocacy group working to reduce and
eliminate estate, gift, and GST taxes while
blocking increased income and capital
gains taxes, the creation of a wealth tax,
and other hostile tax policies that punish
hard work and success.**

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.

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

