



POLICY AND TAXATION GROUP

Join Us! We Are Your Voice.

We advocate for Family Offices and Successful Individuals to stop hostile tax and economic policies in Congress.

STRATEGIC

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

FOCUSED

We educate Congress on 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

We offer original research, insights, 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 highly effective voice in the fight against adverse taxes and has generated numerous legislative wins.



Your Voice on Capitol Hill

Policy and Taxation Group is the national voice of family offices and successful individuals. In Washington, DC, it is focused exclusively on the critical tax and economic policies impacting them.

Since 1995, PATG has been the leading advocacy group working to reduce and eliminate estate, gift, and generation skipping transfer taxes. At the same time, PATG works hard to stop all other hostile tax policies, including blocking increased income and capital gains taxes, the creation of a wealth tax, and other policies that punish hard work and success.

Support Us By Going To:

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WHAT HAS BEEN ACCOMPLISHED

In 2023, Blocked harmful provisions that were initially considered in the BBB and IRA, which continue to be considered in the current Congress, and appeared again in the Green Book. Blocked these sweeping historic provisions: Implementation of a Surtax on Income, Elimination of Like Kind Exchanges and Accelerated Depreciation, Curtailing Passthrough Business Profits (199A), and Increase in the Top Capital Gains Tax.

Over 2021- 2022, the Policy and Taxation Group won many significant legislative victories benefiting family offices and successful individuals. The recent Legislative Wins include Removing Damaging Tax Provisions from the Build Back Better Act, including increases in the Top Income Tax Rate, increases in Estate Tax Rate and Reduction in Lifetime Exemption, Elimination of Grantor Trusts, and Curtailing Passthrough Business Profits / 199A Reduction.

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.