

Dan Goldie Financial Services Supports Estate Tax Reform in 2010

Dan Goldie Financial Services LLC, an independent financial advisory and financial planning firm in Menlo Park, California, announced its support today for revising current estate tax law.

December 7, 2009 (FPRC) -- Dan Goldie Financial Services LLC (<http://www.dangoldie.com>) announced today that it supports revising the current estate tax law, which if left unchanged would cause the estate tax to go to zero in 2010 only to reappear at former 2001 rates in 2011. Many estate and financial planners have argued that the uncertainty over future rates and exemption equivalent amounts caused by current law is disruptive to the financial decision-making of many individuals and families.

"I would like to see some permanence put in place with regard to estate taxes," said Dan Goldie, President of Dan Goldie Financial Services. "Regardless of one's political views on this issue, the lack of certainty with regard to the tax-free amount and rate is disrupting the essential estate planning activities of many families."

The House of Representatives recently voted to approve a permanent extension of the current 2009 estate tax exemption equivalent amount of \$3.5 million per person and \$7 million per married couple and a tax rate of 45% for estate values about these amounts. The bill passed the House by a vote of 225 to 200, with most Democrats supporting and Republicans opposing.

Republicans and some Democrats reportedly want a larger \$5 million exemption equivalent amount and a tax rate of 35% for larger estates. They are threatening opposition to the existing bill, which must pass by December 31 to avoid the estate tax going to zero next year.

Mr. Goldie said, "It seems very likely that there will continue to be an estate tax in our country for the foreseeable future. My hope is that lawmakers will work out a solution that gives people the ability to plan properly for the financial future of their heirs. It is unfortunate that this uncertainty has been allowed to go on for so long."

About Dan Goldie Financial Services

Dan Goldie Financial Services LLC (<http://www.dangoldie.com>) is Registered Investment Advisor located in Menlo Park, California. The firm manages diversified investment portfolios and financial advisor for individuals and families, helping them manage their wealth and make smart financial decisions.

Dan Goldie (<http://www.dangoldie.com/aboutUs.html>) is President of Dan Goldie Financial Services and has been an independent financial advisor and financial planner since 1991. Mr. Goldie is a former professional tennis player and co-author of *The Prudent Investor's Guide to Beating the Market at Its Own Game*. He has an A.B. degree in economics from Stanford University and an M.B.A. degree from the Walter A. Haas School of Business at U.C. Berkeley. He has earned the Chartered Financial Analyst designation and is a CERTIFIED FINANCIAL PLANNER™ certificant.

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