

## Key Estate Tax Figures (2016-2024)

Below is a summary of the estate tax laws as they have changed over the past several years.

March 2024

	2016	2017	2018	2019	2020	2021	2022	2023	2024
<b>Estate Tax Exemption Amount</b>	\$5,450,000	\$5,490,000	\$11,180,000*	\$11,400,000*	\$11,580,000*	\$11,700,000*	\$12,060,000*	\$12,920,000*	\$13,610,000*
<b>Estate Tax Credit</b>	\$2,125,800	\$2,141,800	\$4,417,800*	\$4,505,800*	\$4,577,800*	\$4,625,800*	\$4,769,800*	\$5,107,528*	\$5,389,800*
<b>Maximum Estate Tax Rate</b>	40%	40%	40%	40%	40%	40%	40%	40%	40%
<b>Generation Skipping Transfer Exemption Amount</b>	\$5,450,000	\$5,490,000	\$11,180,000	\$11,400,000	\$11,580,000	\$11,700,000*	\$12,060,000*	\$12,920,000*	\$13,610,000*
<b>Lifetime Gift Tax Exclusion Amount</b>	\$5,450,000	\$5,490,000	\$11,180,000	\$11,400,000	\$11,580,000	\$11,700,000*	\$12,060,000*	\$12,920,000*	\$13,610,000*

## Federal Health Insurance Exchange Enrollment, *continued*

<b>Maximum Gift Tax Rate</b>	40%	40%	40%	40%	40%	40%	40%	40%	40%
<b>Annual Gifting Exclusion Amount</b>	\$14,000	\$14,000	\$15,000	\$15,000	\$15,000	\$15,000	\$16,000	\$17,000	\$18,000

For more information, please contact your Baird Financial Advisor.

\*These provisions expire after 2025 and revert back to the laws in effect for 2017 with inflation adjustments.

Please insert endnotes, sources or additional notes in this area and format as shown here. [Arial 9pt]

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