

# Bloomberg Tax | Research

## Quick Reference Card

### 1. Intelligent Search

Increase efficiency with an easy-to-use search bar available from every screen. Take advantage of our new search results view with a simplified interface allowing you to easily scan through the results and find the most relevant content. Or, try our AI Lab testing environment for exploring AI-powered product concepts designed to transform the way you do tax research.

### 2. Practitioner-Approved Navigation

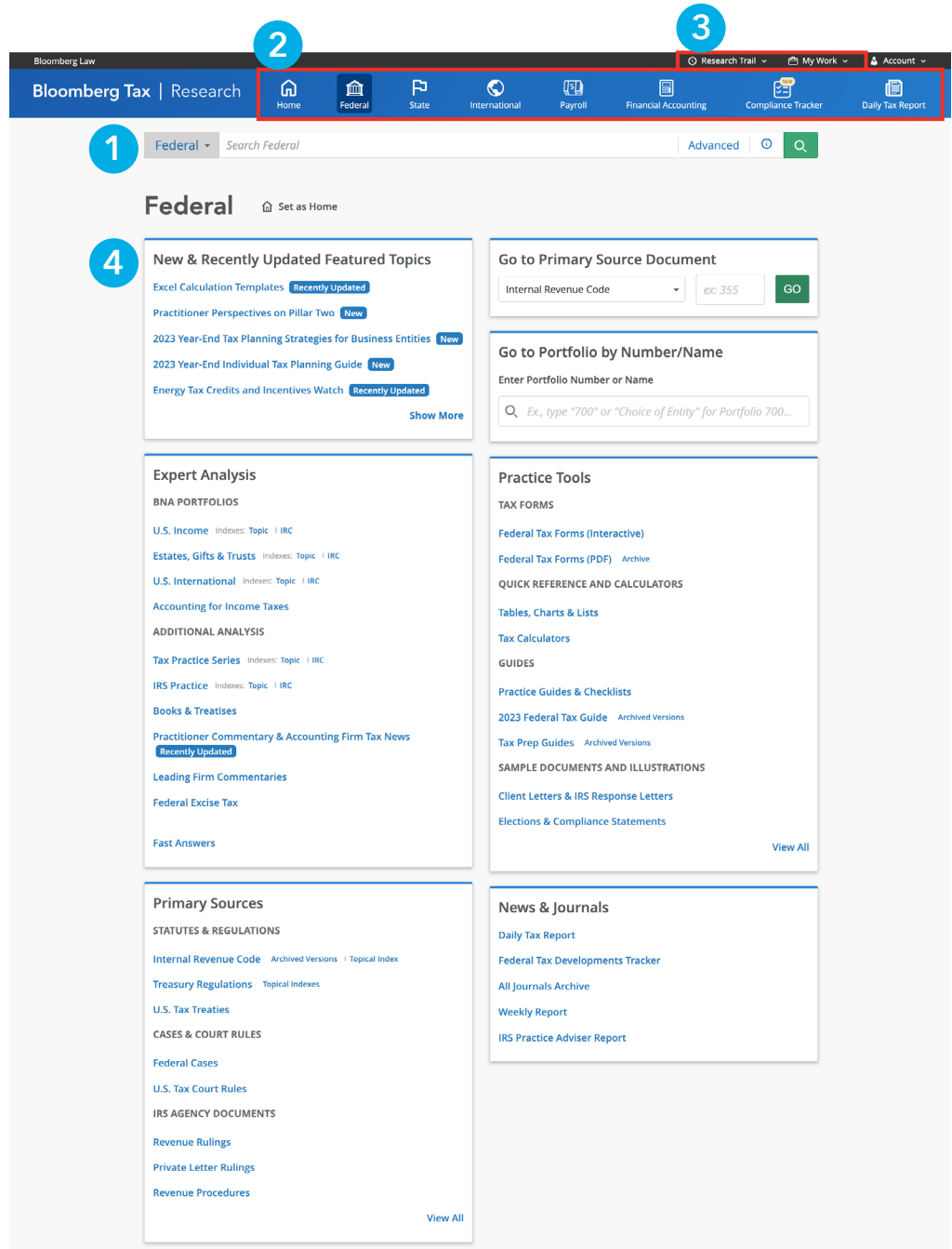
Conduct tax research the way you want with our practitioner-approved navigation that was thoroughly tested for all levels of research expertise to deliver a powerful tax research experience specifically for today's tax practitioner. Access the Federal, State, International, Payroll, and Financial Accounting homepages to access analysis, practice tools, primary sources, and news.

### 3. Collaborative Workspaces and Research Trail

Centralize your research across all Bloomberg Tax products and share it with colleagues using collaborative workspaces, and quickly access recent search queries and results within the last six months with the Research Trail.

### 4. New & Recently Updated Featured Topics

Stay up to the minute with developments with quick links to primary source documents, Bloomberg Tax proprietary analysis, Digital Assets Watch, Tax Season Watch with breaking news and more.



## 5. Expert Analysis Featuring the Tax Management Portfolios

Get expert insight and guidance from leading practitioners on virtually every tax topic with deep analysis, real-world examples, and working papers.

## 6. Practice Tools From Seasoned Practitioners

Increase efficiency by using proven, exclusive timesaving practice aids, including Interactive Forms, Client Letters, Tax Calculators, Elections & Compliance Statements, Practice Guides & Checklists and

Tax Prep Guides.

## 7. Statutes and Regulations

Go straight to all the primary sources. From Internal Revenue Code versions dating back to 1913, to regulations and procedures, to state laws and international tax treaties, our collection of primary sources is fully accessible and fully integrated with the Tax Management Portfolios, Chart Builders, commentary, and analysis.

## 8. News and Journals

Be among the first to know about breaking news and key developments through our unrivaled journals and reports, such as the renowned flagship daily news service, Daily Tax Report®.

The screenshot displays the Bloomberg Tax Research website. The top navigation bar includes links for Home, Federal, State, International, Payroll, Financial Accounting, Compliance Tracker, and Daily Tax Report. A search bar is prominently featured with the text "Federal" and "Search Federal". Below the navigation bar, the main content area is organized into several sections:

- Federal**: A section with a "Set as Home" link and a "New & Recently Updated Featured Topics" list. The list includes "Excel Calculation Templates" (Recently Updated), "Practitioner Perspectives on Pillar Two" (New), "2023 Year-End Tax Planning Strategies for Business Entities" (New), "2023 Year-End Individual Tax Planning Guide" (New), and "Energy Tax Credits and Incentives Watch" (Recently Updated). A "Show More" link is at the bottom.
- Go to Primary Source Document**: A search box for "Internal Revenue Code" with a dropdown menu and a "GO" button.
- Go to Portfolio by Number/Name**: A search box for "Enter Portfolio Number or Name" with a dropdown menu and a "GO" button.
- Expert Analysis**: A section with a "BNA PORTFOLIOS" header and a list of topics: "U.S. Income" (Indexes: Topic | IRC), "Estates, Gifts & Trusts" (Indexes: Topic | IRC), "U.S. International" (Indexes: Topic | IRC), "Accounting for Income Taxes", "ADDITIONAL ANALYSIS", "Tax Practice Series" (Indexes: Topic | IRC), "IRS Practice" (Indexes: Topic | IRC), "Books & Treatises", "Practitioner Commentary & Accounting Firm Tax News" (Recently Updated), "Leading Firm Commentaries", "Federal Excise Tax", and "Fast Answers".
- Practice Tools**: A section with a "TAX FORMS" header and a list of tools: "Federal Tax Forms (Interactive)", "Federal Tax Forms (PDF)" (Archive), "QUICK REFERENCE AND CALCULATORS", "Tables, Charts & Lists", "Tax Calculators", "GUIDES", "Practice Guides & Checklists", "2023 Federal Tax Guide" (Archived Versions), "Tax Prep Guides" (Archived Versions), "SAMPLE DOCUMENTS AND ILLUSTRATIONS", "Client Letters & IRS Response Letters", and "Elections & Compliance Statements". A "View All" link is at the bottom.
- Primary Sources**: A section with a "STATUTES & REGULATIONS" header and a list of sources: "Internal Revenue Code" (Archived Versions | Topical Index), "Treasury Regulations" (Topical Indexes), "U.S. Tax Treaties", "CASES & COURT RULES", "Federal Cases", "U.S. Tax Court Rules", "IRS AGENCY DOCUMENTS", "Revenue Rulings", "Private Letter Rulings", and "Revenue Procedures". A "View All" link is at the bottom.
- News & Journals**: A section with a "Daily Tax Report" header and a list of news and journals: "Federal Tax Developments Tracker", "All Journals Archive", "Weekly Report", and "IRS Practice Adviser Report".

# Bloomberg Tax

## Bloomberg Tax AI Lab

Test drive the latest tax innovations now and get ahead of the curve.

Bloomberg Tax AI Lab is our testing environment for exploring AI-powered product concepts designed to transform the way you do tax research. Simply start a search and click on 'Turn on AI Lab' in the blue bar below the main search bar.

## Get answers in seconds

The new enhancement is a question and answer service, combining Bloomberg Tax Research with a large language model (LLM) to produce an AI-generated summary response. This contextualized response provides a short synopsis, which also identifies the source materials and links directly to the most relevant Bloomberg Tax Research content.

### 1. Turn on AI Lab

Locate the blue banner below the search bar and click on "Turn on AI".

### 2. Utilize the Lab

Agree to the terms and conditions and start your search. You will get an AI-generated output that draws from our gold standard Portfolios, Fast Answers and Navigators.

### 3. Provide Feedback

Submit feedback to help us improve and shape the product for future enhancements.

### 4. Turn Off AI Lab

Simply click on 'Turn off AI' in the blue banner below the search bar.

The screenshot displays the Bloomberg Tax Research interface. At the top, there's a navigation bar with 'Bloomberg Tax | Research' and various icons for Home, Federal, State, International, Payroll, and Daily Tax Report. Below this is a search bar with the query 'To which corporations does the CAMT apply?'. A blue banner below the search bar contains the text 'AI Lab Check out our new lab for AI generated search summaries' and a 'Turn on AI' button, which is highlighted with a red box and a blue circle with the number 1. Below the banner, the 'AI Summary' section provides a detailed response to the query, including a definition of applicable corporations and references to relevant tax materials. A 'References' section lists several sources, including 'Portfolios 752-3rd: Corporate Alternative Minimum Tax IX' and 'Portfolio 756-4th: Computation of Consolidated Tax Liability III'. A feedback prompt asks 'Does this summary help you with your search?' with thumbs up and down icons. At the bottom, there's a 'Turn off AI' button, highlighted with a red box and a blue circle with the number 4. The main search results are visible below, showing a 'Fast Answer' and an 'Agency Document' related to the CAMT query. A 'BNA Picks' sidebar on the right offers additional relevant content.

Bloomberg Tax

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For more information, please visit [pro.bloombergtax.com](https://pro.bloombergtax.com)