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Specific Issues in Estate Planning/probate and Practical Solutions John Wiley & Sons

NEWLY REVISED 2020 EDITION - INCLUDES SECURE ACT INFORMATION Have you been putting off planning your estate because you don't know where to start? This simple-yet-comprehensive guide provides everything you need to know (in plain English) to secure your future-and your family's.

The Estate Planning Today Handbook McGraw-Hill/Contemporary

Covers everything from the basics about wills and living trusts to sophisticated tax-saving strategies for all estates, large and small.

The Living Trust Advisor Morgan James Publishing

Learn how to plan your estate to make a most difficult time for you loved ones simple, quick, and fair. Coping with the death of a loved one is a multi-faceted problem. The emotional and psychological issues can linger unresolved far longer than the myriad and mundane tasks of gathering together assets and disposing of them. The primary reason we take the time to write a will or trust is not for our sake. It is to be sure that the legal process for our heirs is simple, quick, and fair, reflecting not just our wishes but also being mindful of the expectations and needs of those we leave behind. There may be decisions to be made for a surviving spouse such as whether to maintain the marital home, down-sizing, or using senior living facilities. Estate Planning from the Heart for Everyone is a step-by-step guide on how to make and execute these decisions. The next analysis is the actions that must be taken after death. Planning ahead for procedures for distribution of clothing, household goods, family heirlooms, and such is a major problem. Decluttering is a good idea but it is difficult and most often falls on the family who may differing views on how to handle the "stuff" we all accumulate. Interpersonal dynamics are addressed by family members and others who may second guess the actions and decisions of those in charge of the estate. Throughout the book, author and lawyer Ronald Farrington Sharpuses an "Ask the Lawyer" format to describe some common and even unusual questions friends and clients have posed to him. He answers the practical as well as legal aspects of the questions asked with suggested solutions to the concerns raised.

The Living Trust Demos Medical Publishing
Now that you are a parent, wearing clean underwear when you leave home simply isn't enough. You've planned birthday parties, playdates and education, but have you adequately planned for what would happen if you were in an accident? What would happen in the first 24 hours while the officials locate your family members and arrange for your children's care? Are your plans sufficient to keep your children in the care of people you know and trust during these critical hours? And what about your money and home? Will your legal documents keep your family together or tear them apart? In an easy-to-read story format, Wear Clean Underwear takes you on a journey to discover in fast, simple-to-understand terms exactly what will happen based on your current plan, and what happens if you don't have a plan. Showing you how to avoid unnecessary taxes and a broken-down court system, the book guides you to transfer your values, love, and support to your children and loved ones with ease.

J.K. Lasser ProEstate and Business Succession Planning Aspen Publishers
The failproof way to pass along your estate to your heirs without lawyers, courts, or the probate system.

How to Divide Your Family's Estate and Heirlooms Peacefully and Sensibly John Wiley & Sons
For millions of families, elder planning has become life's most important financial challenge. To plan successfully for aging, coordinated and knowledgeable action is indispensable. Whether you're concerned about your own future, your loved ones, or both, Steve Weisman's A Guide to Elder Planning, Second Edition brings together all the up-to-date knowledge and practical insights you'll need. Thorough, realistic, friendly, and easy to read, it covers all the financial, legal, and personal issues faced by seniors and their families. Weisman is one of the nation's most respected eldercare attorneys: through his nationally syndicated radio show A Touch of Grey and his books, he's already helped millions of seniors and their families. Now, he brings together practical insights and specific, innovative solutions for estate planning, investment planning, long term care planning, housing, Medicare, Medicaid, retirement planning, Social Security, veterans' benefits, asset protection, substitute decision making, income tax planning, age

discrimination, protection from abuse and scams, end of life issues, and much more. From navigating fast-changing benefits programs to preparing healthcare directives, this trustworthy book explains it all -- in plain, crystal-clear English!

Estate Planning from the Heart for Everyone Simon and Schuster

Estate planning books often fall into two categories: Those that are overwhelming and full of jargon, focusing on strategies to avoid taxes, or those that provide a general overview of wills, trusts, and estate planning tools and issues at a basic level. Every Californian's Guide to Estate Planning is different: It focuses on estate planning issues that are unique to people who call California home.

A Lawyer's Guide to Working with Special Needs Clients NOLO

JOINT PROPERTY CAN DESTROY YOUR ESTATE. While it seems easy to retitle accounts as joint with a right of survivorship, it can come with DEVASTATING TAXES and LAWSUIT LIABILITY. But there are legal and effective planning solutions to help your family AVOID PROBATE and UNNECESSARY TAXES. Trust planning can provide PEACE OF MIND... but only if you plan ahead, use the RIGHT DOCUMENTS and work with the RIGHT PROFESSIONALS. You'll learn how folk remedies like joint property can produce a tax and legal nightmare; how proven planning techniques can avoid the probate process while avoiding unnecessary taxes; and how a trust can protect your assets from your children's divorcing spouses and bad spending habits.

Estate Planning for the Muslim Client American Bar Association

Ever wonder what questions you should ask when you visit with your estate planning attorney, CPA and financial advisor? This book provides you the clarity and confidence to ask all of the right questions that pertain to your situation. Craig R. Hersch, a Florida Bar Board Certified Wills, Trusts & Estates Attorney/CPA gives you practical advice by relaying his behind-the-desk view to real life situations. He has authored an estate planning column in a Sanibel Island, Florida newspaper since 2004 – and has now compiled several of his best columns into easy to understand chapters. Don't go into your next meeting unprepared! Let Craig's wisdom help guide you.Craig R. Hersch is a Florida Bar Board Certified Wills, Trusts & Estates Attorney and CPA who has published articles in professional trade journals such as The Practical Tax Lawyer, Trusts & Estates Magazine and The Florida Bar Journal. He writes a weekly estate planning column in the Island Sun News newspaper, and has published several books as a part of The Family Estate & Legacy Series™, providing practical advice in everyday language. Craig enjoys a “Preeminent AV” rating at Martindale-Hubbell®, the highest attainable by the national independent attorney rating service, and has been selected as a “Super Lawyer” from 2008-2014. The annual "SuperLawyers®” listing is a consumer ratings service of outstanding lawyers from more than 70 practice areas by Thomson Reuters and published in Law & Politics magazine.

The Nine Steps to a Complete Estate Plan Sterling Publishing Company, Inc.

The five estate planning secrets are described in plain English in a non-boring format. Wills, trusts, and powers of attorney are explained and compared in a easy to understand way. Hidden family issues and their possible solutions are described in real client stories. Valuable information for seniors, parents with adult children with problems, blended families, families with minor children, families with members having special needs, parents of pets and unmarried partners is included. After reading this book anyone will be prepared to talk to an attorney about creating their estate plan or understand the estate planning documents that they already have.

Florida Will and Trust Forms Manual Xlibris Corporation

Just In Case Solutions provides a way of giving your secure information, your ongoing expenses, and various details about your life to your loved one(s) in a confidential workbook. It compliments your estate planning process as well as providing an inventory of your life data. Ask yourself, is your loved one prepared to handle the details if you are in an unexpected accident, or are suddenly stricken with an illness and not able to speak for yourself, or when death inevitably comes? Whether you have one thousand dollars or one million dollars in the bank, loved ones will have the same struggle to determine what you have and where it is located. Once they know something exists and where it is located, they will be able to act accordingly. Completing this workbook is a way to provide some comfort and ease the burden for your loved ones. What's Inside! This workbook has been created to make it easy for you. Take one step at a time and complete each detailed step at your own pace. Step 1: Personal Details Step 2: Family, Friends and Pets Step 3: Health, Medical, and Health Insurance Step 4: Employment, Retirement, Military Step 5: Professionals and Legal Documents Step 6: Financial and Insurance Step 7: Residence, Bills and Loans Step 8: Vehicles and Transportation Step 9: Religion, Activities, Clubs, Subscriptions, and Memberships Step 10: Just in Case of Death

Quick & Legal Will Book John Wiley & Sons

With the help of Stand Up To The IRS, anyone can survive an encounter with the IRS while protecting his or her rights, income, and assets.

Just In Case Solutions: An Easy Way for Everyone to Organize, Record and Deliver Essential Information to Loved Ones in a Scenario Like Accide FT Press

Stay on top of your game - and your client's tax shelter options - regardless of changing regulations - with this compact, relevant new guide highlighting the 3 key elements of successful estate planning. Packed with up-to-date information for today's working professional it's also accessible enough to share with your clients. Benefit from years of estate planning expertise, and develop new skills that will allow you to provide superior client se rvice.--'This compact guide provides relevant, up-to-date information for today's working professional - and is accessible enough for advisor's to share with their clients."By Alan R. Ziegler, CEBS, CLU, ChFC President, Society of Financial Service ProfessionalsStay on top of your game and your client's tax shelter options, regardless of changing regulations. Tax and estate planning expert Lou Shuntich, outlines the latest tax saving solutions that will help minimize estate taxes, provide maximum protection, and leverage client returns.Learn to tackle the 3 key elements of successful estate planning with ease, as Lou's compact reference, guides you through the main steps. His straight-forward approach helps you.- Gain intimate knowledge of the transfer tax laws and the challenges they present.- Become familiar with the available solutions to estate planning problems.- Master the process of analysis in order to identify the challenges and map out the solutions.Benefit from

Shuntich's years of legal experience in business insurance and estate planning - and the continued dedication of the Society of Financial Professionals to provide an on-going source of current, high-quality educations - as you develop new skills that will empower you to provide superior client service.

Baby Boomers Guide to Trusts John Wiley & Sons

As the amount of inter-generational wealth transfer continues to increase rapidly, so does the importance of all forms of succession and estate planning. Ensuring appropriately crafted estate planning documents are in place is particularly critical. The Nine Steps to a Complete Estate Plan is a comprehensive reference source for any adviser wanting to deliver client focused solutions in the area. A methodical, plain English drafting approach and a generous use of practical examples help to ensure the book is user friendly. The book also includes references to legislation and related materials to address all fundamental aspects of the estate planning process. Specific topics addressed include:(a) personally owned assets;(b) superannuation;(c) trust assets;(d) interests in companies or partnerships; and(e) all relevant tax issues that arise.

Stand Up to the IRS Bookbaby

Persons with disabilities and their family members and caregivers face numerous challenges every day. But beyond those day-to-day issues, they often need assistance navigating bureaucracies and in developing plans for long-term care and financial security. This book, written by a special needs attorney, supplies essential information and valuable guidance to the issues involved in representing these clients. The book begins with advice on understanding and representing special needs clients and their families, including key questions to ask to tailor an appropriate plan. Subsequent chapters address other aspects of representing special needs clients, including: - Public benefits, including SSI, Medicare, and Medicaid- Special needs education issues- Special needs trusts- Financial issues- Ethical and practice risks- How to build a special needs legal practice

Get Your Ducks in a Row NOLO

"A Guide to Estate Wills, Conflicts, and Resolutions" offers a comprehensive exploration of estate planning, focusing on the intricate world of wills and the potential conflicts that can arise within families during the estate distribution process. Starting with an introductory overview of the significance of estate planning and the fundamentals of creating a legally sound will, this book navigates readers through a journey that encompasses complex asset management, financial considerations, and the ever-changing dynamics of life and relationships. From discussing the emotional and legal complexities of disinheriting heirs to explaining the critical role of executors and the intricacies of the probate process, this guide provides invaluable insights. It also delves into alternative dispute resolution methods, highlighting the importance of clear communication and professional guidance in achieving harmonious estate planning. Whether you're just beginning your estate planning journey or seeking solutions to existing conflicts, this book equips you with the knowledge and strategies necessary to navigate the complexities of wills and estates with confidence.

Estate Planning for People with a Chronic Condition or Disability C. P. Kumar

This book is written to help individuals address the human issues involved in the transmission of their estates. These are issues and values that, as each individual sees them for himself or herself, are central to the process of estate planning. The book undertakes the challenge of addressing these concerns, purposes, beliefs and values in a way to help individuals find wise and just solutions. From a legal career seeking answers the author brings to the challenge experience, insight, common sense and human understanding.

Estate Planning Marketplace Books

Praise for The Living Trust Advisor "The Living Trust Advisor is a necessary survival guide in the inheritance arena for every American in these turbulent economic times." --Congressman Thaddeus McCotter "Living trusts can be the most important part of an estate plan-saving time and money by reducing or eliminating estate taxes and by avoiding probate. For all those who have or are considering a living trust, The Living Trust Advisor is an invaluable source and an essential tool for any estate plan. Your beneficiaries will thank you." --Angelique M. Neal, former attorney with the IRS, Office of Chief Counsel, Los Angeles "In The Living Trust Advisor Jeffrey Condon not only shows how to make the baffling world of trusts work for the average person, but gives invaluable advice on navigating the complex web of family emotions that inevitably come to the surface in estate planning. His expert advice and guidance should be on the bookshelf of anyone who needs more than just a basic will." --Brian J. O'Connor, Personal Finance Editor, The Detroit News "Jeffrey Condon bonds with the reader on a level that encourages our complete trust in his trust instructions. In this book, he wisely walks readers through all of the pitfalls, tax implications, changes that may occur, and subsequent legal implications. The Living Trust Advisor is a fine and entertaining read as well as an indispensable resource for everyone in need of advice and compassion in making a will or a trust." --Grady Harp, Reviewer for Amazon, Barnes and Noble, Powells, Reuters, USA Today, and Blogging Authors, Author of War Songs, and contributor of essays to museum catalogues

A Practical Guide to Estate Planning MindStir Media

Using a case-study and problems approach, Estate Planning: Principles and Problems, Second Edition, introduces students To The principles of estate planning - progressing from fundamental to complex issues - and then encourages application of those principles by asking students to analyze short problems and exercises using real life client situations. This comprehensive and straightforward Coursebook Series paperback includes a CD containing a broad assortment of common and necessary forms employed in an estate planning practice that can be used to provide students with the drafting experience they will need as practicing attorneys. This hands-on coursebook is organized for maximum effect: fundamental issues are discussed first, then the authors move on to more complex issues, providing the student with the building blocks necessary to master the topics each chapter begins with an overview of topics covered, followed by a more detailed discussion of legal doctrines and principles case studies and exercises emphasize problems and solutions that arise in the actual estate planning process exercises and case studies explore a broad variety of issues and allow flexibility in teaching adaptable organization presents a life-cycle progression reflecting the changing needs of clients from youth through old age, and modest wealth to significant wealth an electronic forms supplement in CD effectively supports a drafting component To The course, essential to master the techniques coverage of federal tax issues is provided for those who wish to teach it, but the topic can be taught or omitted at the instructor's discretion a bibliography at the end of each chapter provides extensive reference sources Completely revamped with a new cover and a new title that better reflects its scholarly nature and comprehensive scope, The Second Edition offers further refinements: updated text to reflect developments in particular subject matters such as the Health Insurance Portability and Accountability Act of 1996, Circular 230 opinion letters, Rule Against Perpetuities, same-gender relationships, asset protection and Medicaid planning revised forms to reflect changes in the law since the First Edition Chapter 16 has been expanded into two chapters: one providing a comprehensive overview of the wealth transfer tax and planning techniques, and the other dealing with probate administration and preparation of the federal estate tax return now includes full texts of crucial cases and rulings, As well as teachable cases, such as: People v. Berge (attorney conflict of interest ethical discipline case) in Re Marriage of Guinn (marital property division case) Estate of Maria Cristofani (Crummey trusts) Revenue Ruling 2004-64 (defective grantor trusts) Revenue Ruling 95-58 (settlor's power to choose trustees) Audrey J. Walton (zeroed-out GRATs) Revenue Ruling 93-12 and Technical Advice Memorandum 9436005 (minority interest discounts) Revenue Ruling 66-167 (waiver of personal representative fees) Revenue Ruling 2006-26 (QTIP IRA trusts) Give your students the best preparation possible For The issues they will face in estate planning. Estate Planning: Principles and Problems, Second Edition , provides the opportunity for students not only to analyze realistic case studies but to experience the hands-on preparation of the appropriate forms and documents.

The Living Trust Advisor Nolo

Meeting the muslim client -- Ethical, legal, and public policy issues -- Estate planning during life -- Planning for incapacity and death; powers of attorney, advance healthcare directives and funeral arrangements -- Disposition of property at death -- New drafting testamentary documents -- Planning for individuals and assets abroad