Legal Estate Planning Solutions

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The Complete Guide to Planning Your Estate in New York Warren Gorham & Lamont
Are you looking to create a customized, profitable, and sustainable maintenance program for your clients? If so, this book is a must-read. Attorney Vincent Bonazzoli is not only a thought leader in estate and elder law but has created a customized client care program, with approximately 500 families and over a 90% annual renewal, that has generated recurring revenue while taking care of families in a unique and satisfying way. This book takes you on his 27-year journey to transform how estate planning services are delivered-to take care of the client and their family when it matters most. In the face of the growing push to commoditize estate and elder law planning services, Bonazzoli has found a pathway for attorneys who want to become trusted advisors to their clients and families, at the same time relieving the financial and cash flow burdens of operating a profitable law firm. This book creates a paradigm shift for the estate planning law firm and their clients and dismantles the dogmatic legal training, education, and social media propaganda that has turned estate and elder law planning into an impersonal transaction. It also shows how the only way to truly take care of the client and their families is to create-and maintain-a meaningful lifetime relationship with them.

Estate Planning in Arizona American Bar Association
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.

Estate Planning Outskirts Press
Engaging and succint, attorney John Kidwell delves expertly into the core concepts in estate planning. A must read for anyone longing to understand the differences between a Last Will and Testament and a Trust, and exactly why each should be considered respectively.

Estate Planning Atlantic Publishing Company
Trusts are the Swiss army knife of estate planning-they are versatile tools that can be used to achieve many different goals. But few non-professionals understand how they work. Written by elder law and estate planning expert Harry S. Margolis, The Baby Boomers Guide to Trusts: Your All-Purpose Estate Planning Tool answers the many questions trust grantors, beneficiaries and trustees have, including: - What distributions can you or must you make? - How is the trust taxed? - What fees may the trustee charge? - Who has a right to accounts? - How can a trust help you meet your tax, asset protection, and long-term care planning goals? Featuring practical advice and easy-to-follow examples gleaned from the author's 30-plus years of experience in elder law and estate planning and questions posed by consumers on his website, AskHarry.info, The Baby Boomers Guide to Trusts: Your All-Purpose Estate Planning Tool will help you know when to use a trust in your estate planning, how to manage it as trustees, and your rights as a beneficiary.

Estate Planning (in Plain English) American Bar Association
Readers say it best: "Very informative." "Saved me a lot of money and headaches!" "Recommend it for everyone who has to plan estates for their elderly parents" Living Trusts for Everyone is the best resource for setting up a living trust. Explaining in specific terms what benefits a trust will have, Ronald Farrington Sharp gives the tools necessary to set up a loved one ' s trust with no lawyers and no expense. Wills benefit lawyers. Trusts benefit the clients. Too often lawyers sell wills to clients only to sit back and wait to sell their probate services to their clients ' heirs. Ronald Farrington Sharp describes the best way to handle modern estate planning and details the many advantages trusts have over wills in not only eliminating probate but in also protecting your assets for your heirs. Sharp explains why legal services are not needed to do the clerical work in settling a trust after death. This updated edition includes new information on an array of subjects, including: Elimination of the federal estate tax for most estates due to increased exemption amounts Online assets The use of passwords, usernames, and websites Keeping trustees honest and the process of removing trustees for malfeasance Forms for simplifying the planning process Strategies to lower attorneys ' fees With no legal jargon, just step-by-step instructions and sample form letters, Living Trusts for Everyone takes the mystery out of the process of setting up a trust.

Plan Your Estate Before It's Too Late Aspen Publishers
Finally, an Estate Planning Guide for Californians Every Californian ' s Guide to Estate Planning helps you understand the basics of leaving money and property to loved ones and charities, and naming a guardian for children—with a special focus on issues unique to California, like: how community property rules affect inheritance and taxes how to minimize capital gains for those inheriting high value real estate legal and tax rules that apply to non-citizens and U.S. permanent residents important issues for international guardians, trustees, and executors how to understand the impact of " Prop 19, " and make sure your heirs don ' t lose a low (" Prop 13 ") property tax rate, and how to avoid California ' s slow and expensive probate system through options such as transfer-on-death deeds. With Downloadable Worksheets Includes access to essential worksheets that help you get started on writing a will, preparing a trust, choosing a guardian, leaving money to kids, naming beneficiaries, choosing agents for your health care directive and power of attorney for finances, doing a personal inventory, and more.

Baby Boomers Guide to Trusts John Wiley & Sons
Imagine building a new home without a set of blueprintssounds absurd, doesnt it? Its no different than creating an estate plan without establishing planning goals, but far too often people engage in estate planning without thinking about what they want to accomplish. In Secure Your Legacy, attorney Richard J. Shapiro tackles the daunting aspects of estate planning and elder law. He answers questions such as: How do you determine if you need a will or a trust (or both)? Whats the difference between a revocable and irrevocable trust? How do you protect assets if you need long-term care? How do you reduce your exposure to estate taxes? He also shares tips on planning for a child with special needs, transferring a business, and ensuring a beloved pet is taken care of if you die or become incapacitated. He also explains why you should never create an estate plan online. Filled with real-world examples, this guide gives you the critical information you need to work with an attorney to create an estate plan that protects you and your loved ones.

The Living Trust Xlibris Corporation
What happens to your estate after you are gone is very much within your control. Estate planning is not only for the wealthy; it is for everyone. It is simply the process of deciding where your assets are to be distributed after your death. For those people who wish to preserve their assets for designated purposes such as family or special charities it becomes necessary to make special advance preparations. Your estate plan should also allow for the possibility of your own disability. It should detail what you own and whom you want to leave it to at a time of your choosing and the way you want. Your estate plan should include fully disclosed, controlled costs for you and your loved ones. The last thing you want to worry about is having your estate drained of value through taxes and legal costs. The right plan can protect the value of your estate and spare your loved ones unnecessary hassles and legal conflicts. The Complete Guide to Planning Your Estate in New York will help you glide through this complicated process. This new book has been adapted to offer New York residents state-specific advice for estate planning. Co-authors Margo Pierce and Linda C. Ashar, attorneys at law, have crafted an estate planning primer, allowing New York residents to become more informed and more involved during the process. Many books on estate planning indicate you do not need the services of an attorney, but this book highly recommends using an attorney versed in this area: You should not go through the process alone. This book is intended explain the complicated issues, terminology, and planning strategies of estate planning so when you do meet with a qualified attorney, you will be well prepared. New York-specific information is offered throughout this book, including: New York's probate code; New York rules, regulations, and laws specific to estate planning; elements of a valid New York will; planning your living will in New York; explanations of New York laws regarding durable health care power of attorneys, do not resuscitate (DNR) orders, and directives to withhold CPR. Estate planning should be a positive experience. It involves reviewing your situation and planning for

your future. Other books offer a non-state-specific overview of estate planning, causing many readers to be misinformed about rules and regulations particular to their state; but, this new book provides information New York residents need to know. Do not get outdated or wrong information that does not pertain to you specifically. Use this new book to craft an estate plan that is not only legally sound but also fully carries out your last wishes and protects your loved ones. Atlantic Publishing is a small, independent publishing company based in Ocala, Florida. Founded over twenty years ago in the company president â e(tm)s garage, Atlantic Publishing has grown to become a renowned resource for non-fiction books. Today, over 450 titles are in print covering subjects such as small business, healthy living, management, finance, careers, and real estate. Atlantic Publishing prides itself on producing award winning, high-quality manuals that give readers up-to-date, pertinent information, real-world examples, and case studies with expert advice. Every book has resources, contact information, and web sites of the products or companies discussed.

Thinking Beyond Tomorrow Sterling Publishing Company, Inc.

WE THE PEOPLE No lawyers. Save money. We The People is America's largest legal document services company. Dedicated to helping every American avoid the high cost of legal fees, We The People gives you the information you need to handle your own legal filings quickly, easily, and inexpensively. Hundreds of thousands of Americans have already liberated themselves from the tyranny of attorneys' fees--and now you can too! We The People's Guide to Estate Planning makes planning for your future as painless as possible--all without the added hassle of hiring a lawyer. This practical, nuts-and-bolts guide covers all the basics of do-it-yourself estate planning, and covers everything you need to know about living trusts, wills, probate, and estate taxes. Extra resources--a glossary of estate planning terminology; a section on frequently asked questions; samples of effective living trusts and a last will and testament; as well as worksheets and essential information on how to settle an estate--make this the best resource available for this important step in planning for the future. You'll have all the information you need to understand the legal language of a will or living trust and learn how to seek state-specific laws and customs so you can tailor your plans accordingly. In addition, you can download sample documents from which you can create your own. Inside, you'll learn all the basics and more: * Whether you need a living trust, a will, or both * Creating a valid last will and testament * Designating a successor trustee or executor to an estate * Deciding who gets what--and making sure they do * Setting up a living trust and funding it with assets * Understanding durable power of attorney documents and living wills * Tax-saving tips that help you leave more for your beneficiaries * Getting to know (in plain English) the legal language of your will or living trust * Where to download sample documents * Settling an estate with or without a valid will or living trust It's important to take care of the ones you love after you're gone. But if your estate planning isn't done clearly, precisely, and legally, you could end up creating more problems for your survivors than you solve. Do it right, do it inexpensively, and do it yourself--with We The People's Guide to Estate Planning.

Thinking Beyond Tomorrow Createspace Independent Publishing Platform

What happens to your estate after you are gone is very much within your control. Estate planning is not only for the wealthy; it is for everyone. It is simply the process of deciding where your assets are to be distributed after your death. For those people who wish to preserve their assets for designated purposes such as family or special charities it becomes necessary to make special advance preparations. To ensure your assets are protected and final wishes are carried out, there are some common actions that should be taken now. Proper estate planning allows you to plan for yourself and your loved ones without giving up control of your affairs. Your estate plan should also allow for the possibility of your own disability. It should detail what you own and whom you want to leave it to at a time of your choosing and the way you want. Your estate plan should include fully disclosed, controlled costs for you and your loved ones. The last thing you want to worry about is having your estate drained of value through taxes and legal costs. The right plan can protect the value of your estate and spare your loved ones unnecessary hassles and legal conflicts. The Complete Guide to Planning Your Estate in Florida will help you glide through this complicated process. This new book has been adapted to offer Florida residents state-specific advice for estate planning. Author Linda C. Ashar, Attorney at Law, has crafted an estate planning primer, allowing Florida residents to become more informed and more involved during the process. Many books on estate planning indicate you do not need the services of an attorney, but this book highly recommends using an attorney versed in this area: You should not go through the process alone. This book is intended explain the complicated issues, terminology, and planning strategies of estate planning so when you do meet with a qualified attorney, you will be well prepared. You will understand the legal terms and be ready to discuss issues and strategies with familiarity, saving you time and legal fees and ensuring peace of mind. Florida-specific information is offered throughout this book, including: Florida''s probate code; Florida rules, regulations, and laws specific to estate planning; elements of a valid Florida will; planning your living will in Florida; explanations of Florida laws regarding durable health care power of attorneys, do not resuscitate (DNR) orders, and directives to withhold CPR. The book''s easy-to-understand context clarifies this complicated and sensitive subject and gives readers the power to take control of their future. This book also offers an overview of abatement rules, settlement costs, guardianship and minor children, executors and trustees, life insurance, potential long-term care needs, marital deductions, types of trusts, gift splitting, survivorship deeds, 529 plans, reducing or eliminating estate taxes, avoiding tax on life insurance, using insurance to pay estate taxes, gift tax issues, generation skipping transfer tax, and tax-deferred accounts. Estate planning should be a positive experience. It involves reviewing your situation and planning for your future. Although few people want to think about the possibility of disability or disease, advance planning is also a way to show your love and to reduce potential distress later. Other books offer a non-state-specific overview of estate planning, causing many readers to be misinformed about rules and regulations particular to their state; but, this new book provides information Florida residents need to know. Do not get outdated or wrong information that does not pertain to you specifically. Use this new book to craft an estate plan that is not only legally sound but also fully carries out your last wishes and protects your loved ones. Atlantic Publishing is a small, independent publishing company based in Ocala, Florida. Founded over twenty years ago in the company president â e(tm)s garage, Atlantic Publishing has grown to become a renowned resource for non-fiction books. Today, over 450 titles are in print covering subjects such as small business, healthy living, management, finance, careers, and real estate. Atlantic Publishing prides itself on producing award winning, high-quality manuals that give readers up-to-date, pertinent information, real-world examples, and case studies with expert advice. Every book has resources, contact information, and web sites of the products or companies discussed.

Estate Planning Guide John Wiley & Sons

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 for Women Createspace Independent Publishing Platform

Estate planning, in plain English. Get the need-to-know basics about wills, trusts, avoiding probate, and planning for incapacity with Estate Planning Basics. This book lays out your options in plain English, guiding you to the right estate plan for you and your family. Learn how to: make a will or living trust, name a guardian for your children, avoid probate, choose an executor, use durable powers of attorney, and prepare a health care directive. This edition is completely updated to reflect the latest information about estate planning.

Living Trusts for Everyone Marketplace Books

This book is meant to give you the basics on what Florida Estate Planning entails, which are the end-of-life documents that everyone needs in order to provide instructions about how to handle your health care and financial decisions, and how to transfer your personal and real property in case of your incapacitation or death.

Estate Planning and Wealth Preservation Longview Publishing

The failproof way to pass along your estate to your heirs without lawyers, courts, or the probate system.

Every Californian's Guide To Estate Planning Createspace Independent Publishing Platform

Lawyer and financial planner Michael T. Palermo explains everything you need to know about wills, trusts, and more.

Estate and Trust Planning Simon and Schuster

Trusts and estates practice is being increasingly recognised as an occupation within the legal, accounting, tax and financial services professions. Estate planning remains the strategic advisory component within this practice. An essential resource for practitioners and students involved in trusts and estates practice, this easy-to-use, practical and comprehensive guide will enable you to understand and deliver effective estate planning services using the principles, precedents, practice points, case notes and discussion questions contained in this book. Included in this edition are the legislative changes enacted since the first edition, such as changes to wills and estate law arising from the commencement of the Succession Act 2006 (NSW) on 1 March 2008 as well as changes to income tax and superannuation laws since 2005.

The Complete Guide to Planning Your Estate in Pennsylvania Nolo

Navigate probate, tax issues, and state laws Create an estate plan and protect your family's interests Need a will, but have no idea where to start? This friendly guide shows youhow to prepare a legal will or trust -- either on your own or with professional help -- and ensure that your wishes are honored. You'll handle everything from planning your bequests and writing and signing a will to selecting a trust and drafting your durable power of attorney. Discover how to: Provide for your children Hire and work with professionals Minimize tax liabilities Amend or revoke a will or trust Avoid common estate planning mistakes Note: CD-ROM/DVD and other supplementary materials are not included as part of eBook file.

Florida Estate Planning Wheatmark, Inc.

Thinking Beyond Tomorrow has legal information, resources and analysis that cannot be found anywhere else. Written by Attorneys Paul Premack and Benjamin Premack as the successor to The Senior Texan Legal Guide, this new book is packed with legal information and planning strategies. Available as an eBook or as a paperback book. Thinking Beyond Tomorrow answers your questions about: Estate Planning - Wills, Living Trusts, Survivorship Rights and avoiding ProbatePlanning for and managing your medical careLife Support Issues and Death with DignityPlanning for Non-Traditional RelationshipsPet TrustsGun TrustsPlanning for and managing your financesProtecting your Assets and your homeFamily and Marital Property IssuesMinimizing Federal Estate TaxesTaking action when a loved one diesSettling an Estate and being an Executor

Basic Estate Planning in Florida, Fifth Edition Nolo

Few people want to think about what would happen to their families if they become disabled or die; however, planning for these occurrences in advance will reduce potential stress on your family later in life. The right plan can protect the value of your estate and spare your loved ones unnecessary hassles and legal conflicts. This book will take the guesswork out of planning your estate and help you finally understand the complex processes. Your New York Wills, Trusts, & Estates Explained Simply will help you glide through this complicated process. This book has been adapted to offer New York residents state-specific advice for estate planning. Author Linda C. Ashar, attorney at law, has crafted an estate-planning primer that allows New York residents to become more informed and more involved during the process. Your New York Wills, Trusts, & Estates Explained Simply will provide all the information you need to choose, set up, and execute a will, trust, or estate. You will learn the legal terminology, including beneficiary, probate, trustor, trustee, assets, guardianship, and executor. You will also learn about trust agreements, trust property, settlement costs, life insurance, durable powers of attorney, marital deductions, gift splitting, survivorship deeds, gift tax issues, generation skipping transfer tax, tax deferred accounts, and advance directives. Atlantic Publishing is a small, independent publishing company based in Ocala, Florida. Founded over twenty years ago in the company president â e(tm)s garage, Atlantic Publishing has grown to become a renowned resource for non-fiction books. Today, over 450 titles are in print covering subjects such as small business, healthy living, management, finance, careers, and real estate. Atlantic Publishing prides itself on producing award winning, high-quality manuals that give readers up-to-date, pertinent information, real-world examples, and case studies with expert advice. Every book has resources, contact information, and web sites of the products or companies discussed.

Your New York Wills, Trusts, & Estates Explained Simply Atlantic Publishing Company

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 service.---'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.