Legal Estate Planning Solutions

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AARP Crash Course in Estate Planning Bookbaby

Will and trust forms annotated with alternate clauses, pitfalls to avoid, practice tips, recent cases, and tax considerations, and includes questionnaires, explanatory cover letters, asset flow charts, and case-based examples.

Wear Clean Underwear! Schumacher Publishing

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.

Wills and Trusts Kit For Dummies John Wiley & Sons

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

The Tax and Legal Playbook Allworth

ESSENTIALS OF PERSONAL FINANCIAL PLANNING Essentials of Personal Financial Planning was written to challenge the status quo by promoting personal financial planning (PFP) as a profession, not as a sales tool to gather assets under management or facilitate sales of insurance products. The book takes a comprehensive and integrated approach to PFP for accounting students, allowing them to view the profession through the lens of a CPA – with integrity and objectivity. This book systematically introduces the essentials of all the major PFP topics (estate, retirement, investments, insurance, and tax), as well as: The PFP process, concepts and regulatory environment. Professional responsibilities of a CPA personal financial planner and the requirements of the Statement on Standards in PFP Services. Time value of money concepts. The book then builds on these foundational concepts, showing their interconnectivity and professional opportunities, to provide a deeper understanding of PFP and its application. After reading this book, students will be able to apply the knowledge and skills gained from this course to have an immediate and long-term positive impact for themselves and for the clients they serve.

Estate Planning West Publishing Company

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.

Specific Issues in Estate Planning/probate and Practical Solutions Wolters Kluwer

The Answer to All Your New York Elder Law Questions New York Elder Law provides analysis and commentary on the laws and regulations affecting the elderly in New York. As the New York companion to Tax, Estate & Financial Planning for the Elderly and Tax, Estate & Financial Planning for the Elderly: Forms & Practice from Matthew Bender, this new handy "how-to" practice guide covers a broad spectrum of legal and financial issues of special concern to the elderly and their families. It includes: planning for disability; Medicaid eligibility, spousal rights, financial responsibility of third parties, transfer of assets, liens, estate recovery, and fair hearing advocacy; supplemental needs trusts; guardianships; estate planning and wills; health care coverage and resources; financial planning; income and estate tax, and elder abuse.

Solving The Retirement Puzzle With Four Easy Pieces Aspen Publishing

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.

Costa Rica Company Laws and Regulations Handbook Volume 1 Strategic Information and Basic Laws Lulu.com

This casebook introduces students to the principles of estate planning and challenges them to analyze simulated client scenarios. Featuring a case-study and problems approach in which the principles of estate planning are first introduced and then demonstrated through student analysis of short exercises and simulated client situations. A forms supplement on a CD is an additional tool for giving students practice with drafting exercises.

San Diego Magazine Marketplace Books

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 Living Trust American Bar Association

A guide to estate planning discusses such topics as wills, the probate process, selecting an executor, living trusts, naming a guardian for young children, living wills, and setting up a power of attorney.

Florida Estate Planning John Wiley & Sons

The most respected and bestselling estate planning software is now available in an easy-to-use book format! No one wants to hire expensive lawyers to make a will and other important documents so turn your readers to Quicken WillMaker, the most complete estate planning title available on the market. Quicken WillMaker is Nolo's all in one estate planning book, covering everything from the basics of wills to sophisticated tax-saving strategies. It provides readers straightforward explanations of every significant option available, so they can make the best decisions for their families.Best of all, your readers won't just understand wills, living trusts or financial power of attorney they'll create them, quickly and easily. The interactive CD-ROM lets them make: legal wills, living trusts, healthcare directives (living wills), powers of attorney, final arrangements documents, forms for executors, promissory notes, credit repair forms, authorizations and agreements, and more! Many companies publish books about estate planning, but Nolo is the only publisher to provide a complete solution to your readers' needs!

Estate Planning from the Heart for Everyone Demos Medical Publishing

The Model Rules of Professional Conduct provides an up-to-date resource for information on legal ethics. Federal, state and local courts in all jurisdictions look to the Rules for guidance in solving lawyer malpractice cases, disciplinary actions, disqualification issues, sanctions questions and much more. In this volume, black-letter Rules of Professional Conduct are followed by numbered Comments that explain each Rule's purpose and provide suggestions for its practical application. The Rules will help you identify proper conduct in a variety of given situations, review those instances where discretionary action is possible, and define the nature of the relationship between you and your clients, colleagues and the courts.

Managing an Estate Planning Practice McGraw-Hill/Contemporary

EFFECTIVE ESTATE AND BUSINESS SUCCESSION PLANNING UNDER THE NEW TAX LAW A properly designed and implemented estate and/or business succession plan is key to providing for and protecting loved ones in the most tax-efficient manner possible. A team of advisors must be assembled from the disciplines of law, insurance, finance, accounting, and tax in order to create a plan that optimizes planning opportunities incorporating both the current state of law with the current state of one ' s mind. J.K. Lasser Pro Estate and Business Succession Planning, Second Edition provides you with a unique and comprehensive analysis of the Economic Growth and Tax Relief Reconciliation Act of 2001, the new retirement distribution rules, Section 529 education plans, and split dollar insurance guidelines. It can help professionals and experienced individuals alike take advantage of opportunities presented by the new tax law, avoid common mistakes, and understand complex estate and business succession planning techniques. Written by two attorneys who specialize in estate planning matters, this easy-to-read book provides you with complete information and strategies for a variety of issues including: How to plan in light of the phased-in provisions of the Economic Growth and Tax Relief Reconciliation Act of 2001 Top twenty factors to consider when creating one ' s Will, as well as creating a Power of Attorney and Health Care Proxy Annual Exclusion and Exemption Equivalent Planning Irrevocable Life Insurance Trusts and Crummey Notices Charitable Remainder Trusts and Foundations Family Limited Partnerships Business Succession Planning Techniques Split Dollar Plans Section 529 education plans Retirement distribution rules Self-Canceling Installment Notes Intentionally Defective Grantor Trusts GRITs, GRATs, and GRUTs And this is just a sampling of the expertise that the authors provide in a truly unique and understandable text. J.K. Lasser Pro Estate and Business Succession Planning, Second Edition contains all you need to make the most of the new tax law while navigating this complex area, and shows you how to protect and provide for loved ones for generations to come. Please visit our Web site at www.jklasser.com

Common Cents Estate Planning Entrepreneur Press

The Living TrustMcGraw-Hill/Contemporary

Model Rules of Professional Conduct Aspen Publishers

This is the first comprehensive estate-planning guide for those living with a chronic disease or disability. This book is targeted at those planning for the disbursement of their estates, no matter their size. Estate-planning is crucial for those living with a chronic disease or disability: individuals must express their preferences whether to receive long-term care at home rather than in a nursing home in the event that they become more disabled, and it is more important for one who has a chronic illness to name a power of attorney. Estate Planning for People with a Chronic Condition or Disability covers all of those topics plus: How to write your will How to determine how much life insurance your family needs How to figure out whether you need a living trust Learn about powers of attorney When to work with a lawyer, if you need to The book also includes downloadable sample forms for: Power of Attorney Living Will Designation of Proxy for Financial and Health Decisions

Glass Half Full LexisNexis

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.

The Estate Planning Today Handbook John Wiley & Sons

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

Taxation and Estate Planning Oxford University Press

Suze Orman's Financial Package is a systematic approach for organising your essential documents. The Financial Package is very different from any other product of this type, because Suze has included three CDs that actually include the forms and instructions to create your own advanced directive with durable power of attorney for health care, financial power of attorney, will, and a trust.

Suze Orman's Protection Portfolio John Wiley & Sons

Since its first printing in 2012, Solving The Retirement Puzzle With 4 Easy Pieces has become a guidebook for soon-to-be and recent retirees alike. Coauthored by Peter Wechsler, retirement & income planning specialist, and Jeremy A. Wechsler, Esq., Your Estate Planning and Asset Protection Attorney, Solving The Retirement Puzzle leads you through the potential minefields of both retirement and estate planning. Having focused exclusively on retiree issues for the past 18 years, Peter and Jeremy know the importance of having a solid, secure plan for your nonwork years to ensure reliable income and peace of mind, even amidst up and down markets. As an Investment Advisor Representative and retirement & income planner, Peter explains how he helps folks navigate the many challenges involved in retirement planning. Using their " Four Step Discovery Review Process " as a guide, the pages of Solving The Retirement Puzzle start with Peter ' s exploration of Income and Tax Planning, along with Risk Exposure and Risk Comfort Level. Those principles established, Jeremy then tackles Estate and Elder Planning. You ' ve worked hard to build your nest egg. You saved, you scrimped and you sacrificed - determined to retire comfortably and leave a lasting legacy for those you love. Now, you must strive to protect and preserve that nest egg while also using it for your future and the future of your kids and grandkids. But you can ' t do it alone. Peter and Jeremy, and Solving The Retirement Puzzle With 4 Easy Pieces, have the information and insight you need.

New York Elder Law Morgan James Publishing

Provides practical advice for parents on protecting their children and assets, including three stories that explain the legal processes associated with guardianship, documentation, trustees, and other related topics.