

Estate Planning Basics

Estate Planning in Arizona
The Everything Wills and Estate Planning Book: Professional Exam Prep for: Estate Planning Basics
Estate Planning, 5E
The Mom's Guide to Wills & Estate Planning
Estate Planning
Estate Planning for People with a Chronic Condition or Disability
Estate Planning (in Plain English)
Wills, Trusts, and Estate Administration
Principles of Estate Planning
Estate Planning Basics
Estate Planning Basics
Estate Planning Basics
Financial Planning Basics for Doctors
Essentials of Personal Financial Planning
The Tools and Techniques of Estate Planning for Modern Families
A Lawyer's Guide to Estate Planning
Book of Estate Planning Questions and Answers
Estate Planning and Elder Law Basics
Estate Planning For Dummies
8 Ways to Avoid Probate
Estate Planning Basics
Florida Estate Planning
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The Complete Guide to Organizing Your Records for Estate Planning
Your California Wills, Trusts, & Estates Explained Simply
Beyond the Grave revised edition
The Legacy Journey

Estate Planning in Arizona

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

The Everything Wills and Estate Planning Book: Professional

Financial Planning Basics for Doctors is a comprehensive guide on building a long-term financial plan for doctors and their families. Subjects covered include student loans, home buying, disability insurance, estate planning, college planning, retirement planning, investments, and behavioral finance, among many others. Each chapter starts with the basics before

addressing more advanced concepts, frequently with examples and graphs, and concludes with a concise summary of the key takeaways. Throughout the book, there are links to free downloadable spreadsheets and a planning checklist to help you jump-start and organize your financial plan. The content provided is a result of the feedback the authors have received over thousands of meetings with doctors, condensed into a thorough overview of the most relevant ideas. Teaching hospitals do an excellent job of training our next generation of doctors, yet most new physicians graduate without having had a class on managing their finances. This book was written to fill that knowledge gap. Marshall Weintraub, Michael Merrill, and Cole Kimball are financial advisors with Finity Group, LLC, a financial planning firm specializing in working with doctors.

Exam Prep for: Estate Planning Basics

Writing in a question-and-answer format, Todd includes questions most frequently asked by clients during the course of his more than twenty-seven years of estate planning practice. Attorneys will benefit by providing the book as a reference for clients, while laypeople can use it as a preparation guide when seeking assistance from an estate planning lawyer.

Estate Planning, 5E

Presents a comprehensive guide on understanding and preparing wills and trusts for parents of young children, describing the process of selecting a guardian, buying life insurance, designating powers of attorney, and choosing beneficiaries.

The Mom's Guide to Wills & Estate Planning

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

Anyone with assets and heirs needs a will to determine what will happen to their property and plan for the welfare of their children should they pass away unexpectedly. As people age, they tend to think more seriously about having a will and planning their estates, to make it easier for their heirs, and to give them the maximum amount of money possible. Idiot's Guides: Estate Planning, Fifth Edition makes it easy to understand all the issues surrounding estates. In it, you get: - An introduction to the important concepts of estate planning and how to get started on a plan. - Valuing your property and assets and how you own it, including businesses and self-employment issues. - Getting the most from life insurance, pensions, and retirement savings. - Creating a will and trusts, and learning how probate works. - Looking after minor children in the event of your death, planning for special situations such as divorce and bankruptcy, and avoiding family feuds over inheritance. - Everything you need to know about taxes: estate, gift, state and federal income--and how to ensure that your heirs get the assets you have intended for them. - Planning for retirement, including Social Security benefits, power of attorney, and health care directives.

Estate Planning for People with a Chronic Condition or Disability

Estate Planning (in Plain English)

Wills, Trusts, and Estate Administration

A true self-help book that shows, in plain English, how to prepare an estate plan without the expensive services of a lawyer. Attorney Denis Clifford provides all the up-to-date forms and step-by-step instructions needed to let individuals with estates under \$600,000 do the job themselves. "Instills in the reader a sense of self-confidence for handling delicate legal issues".--Library Journal.

Principles of Estate Planning

If you're like most people, you want to be sure that, once you've passed on, no more of your property and money will be lost to the government than is absolutely necessary. You want to know that you'll be leaving your heirs your assets and not your debts. You want to be absolutely certain that your will is ship-shape, your insurance policies are structured properly, and that every conceivable hole in your estate plan has been filled. And most of all, you'd like to do all of this without

driving yourself crazy trying to make sense of the complicated jargon, jumble of paperwork, and welter of state and federal laws involved in the estate planning process. Written by two estate planning pros, this simple, easy-to-use guide takes the pain out of planning for your ultimate financial future. In plain English, the authors walk you step-by-step through everything you need to know to: Put your estate into order Minimize estate taxes Write a proper will Deal with probate Set up trusts Make sure your insurance policies are structured properly Plan for special situations, like becoming incompetent and pet care Craft a solid estate plan and keep it up-to-date Don't leave the final disposition of your estate up to chance and the whims of bureaucrats. Estate Planning For Dummies gives you the complete lowdown on: Figuring out what you're really worth Mastering the basics of wills and probate Using will substitutes and dodging probate taxes Setting up protective trusts, charitable trusts, living trusts and more Making sense of state and federal inheritance taxes Avoiding the generation skipping transfer tax Minimizing all your estate-related taxes Estate planning for family businesses Creating a comprehensive estate plan Straightforward, reader-friendly, easy-to-use, Estate Planning For Dummies is the ultimate guide to planning your family's future.

Estate Planning Basics

Estate Planning Basics

Planning your estate is a long, complicated process that requires much time and effort. The process of organizing your records for estate planning is equally time consuming and complex. Hiring an attorney to assist you may cost more than you are willing to spend. With the help of *The Complete Guide to Organizing Your Records for Estate Planning*, you can not only take charge of your estate planning documentation, but also save time, money, and effort. In this new book, you will learn how to find an organizational system that works for you, where to look for records, what to record, who to tell, where to keep records, and how often to update your records. You will also find information on creating a will or a living will, setting up a trust, assigning power of attorney, and filling out health care directives. Additionally, you will learn about the documents that should be included in your estate plan, such as insurance policies, Social Security cards, birth certificates of minor children, stock brokerage statements, credit card numbers and statements, certificates of deposit, real estate deeds, mortgage statements, retirement account savings, non-retirement account savings, and current bank statements. The CD-ROM is filled with sample documents and worksheets, as well as a checklist of often overlooked information, including any medications you take, where you worked, where your savings and checking accounts are located, where your car title is located, what your funeral plans or wishes are, and who should receive what. *The Complete Guide to Organizing Your Records for Estate Planning* will help you prepare your documents and record your final instructions and wishes. By using the information provided in this book you will save money you might otherwise have spent on legal and accounting fees. In

addition, you will save your family the frustration of searching for these documents if something should ever happen to you. This book, written in an easy-to-understand language, will walk you through the process of organizing your records and make the process much easier for you and your family. The companion CD-ROM is included with the print version of this book; however is not available for download with the electronic version. It may be obtained separately by contacting Atlantic Publishing Group at sales@atlantic-pub.com Atlantic Publishing is a small, independent publishing company based in Ocala, Florida. Founded over twenty years ago in the company president'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 Basics

"An invaluable tool to help you collect the information your attorney needs." —Michael Cragun, Utah State Tax Commissioner An Accessible Guide to Estate Planning With Estate Planning (in Plain English)®, readers will learn to comprehend the legal jargon and navigate the complex rules involved in preparing one's estate. The authors provide clear information and cite actual cases to help readers approach the process with the confidence and knowledge they need to make the best decisions for their heirs. Chapters discuss important topics such as: Estate plans, wills, and a variety of trusts Guardians, powers of attorney, advance directives, and other essential documents Life insurance Digital assets Gifts Tax considerations Avoiding probate Identifying and caring for estate property Settling business assets Finding a lawyer An invaluable reference for those preparing their estates and for their families, Estate Planning (in Plain English)® will enable readers to take the necessary steps to preserve their legacies.

Financial Planning Basics for Doctors

Estate Planning Made Easy encourages the 75% of Americans who don't have a plan to stop procrastinating. Readers learn step-by-step how to: guard assets both now and later; provide for heirs; and pass on their estates virtually intact. Includes hundreds of easy-to-implement planning tips.

Essentials of Personal Financial Planning

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.

The Tools and Techniques of Estate Planning for Modern Families

Succeed in your course and your paralegal career with WILLS, TRUSTS, AND ESTATE ADMINISTRATION, 8th Edition. This easy-to-understand text introduces the basics of estate planning and bequeathing property to others through wills and trusts, along with the laws and procedures involved, including the Uniform Probate Code. Packed with engaging, highly visual content enhanced by detailed exhibits and a writing style free of confusing legalese, the 8th Edition provides up-to-date coverage of relevant laws, court procedures, cases, tax implications, ethical considerations, and the roles paralegals and other professionals play in the process. Throughout the text, user-friendly case summaries, state-specific examples, practical assignments, detailed documents, and real-life contemporary issues prepare you for success as a paralegal in this important area of law. Important Notice: Media content referenced within the product description or the product text may not be available in the ebook version.

A Lawyer's Guide to Estate Planning

Through proper funeral planning, you can ensure that your loved ones are not confronted with the unnecessary burden of having to plan a funeral at a time which is already very traumatic for them. By having a clear funeral plan, you can have every detail of your funeral arranged in advance or, at the least, have a clear plan that your loved ones can follow when the time comes. This comprehensive funeral planning book will take you step-by-step through the process of planning a funeral. It will introduce you to issues such as organ donations, purchasing caskets, cremation, burial, purchasing grave plots, organization of funeral services, the legal and financial issues relating to funerals, the cost of pre-arranging a funeral, how to save money on funerals, how to finance funerals and much more. Once you have gained an understanding of the various issues involved in planning a funeral, you will be ready to complete the accompanying step-by-step funeral planning worksheets to help plan the funeral you want. "Funeral Planning Basics" Tell Your Loved Ones What You Want Pre-Pay and Arrange Your Funeral in Advance Remove a Huge Burden from Your Family Save Money

Book of Estate Planning Questions and Answers

The Tools & Techniques of Estate Planning for Modern Families, 2nd Edition, discusses the estate planning issues that are unique to modern families. It moves from a basic estate planning overview to a discussion of the unique issues in today's modern families. It also includes tax issues, premarital and relationship formalization considerations, and lifetime estate planning options. This second edition has extensive changes to it and focuses even more on the specific problems of the

"modern family" in today's world. This resource is filled with practical advice and examples in an easy to understand language. Following are the topics covered in detail for this edition: ♦ Best practices for working with any Modern Family ♦ Planning for divorce ♦ Planning for remarriage and blended families ♦ International couples ♦ Unmarried couples ♦ Cohabitation agreements ♦ Estate planning for same-sex couples ♦ Advising transgendered clients ♦ Adoption and defining descendants ♦ Artificial reproductive technologies ♦ Planning for clients with longer life spans ♦ Planning for clients with faded capacity ♦ Digital assets

Written and edited by these renowned experts in the estate planning field, *The Tools & Techniques of Estate Planning for Modern Families* is the authoritative but practical resource you can rely on:
Author: Stephan R. Leimberg Executive Editors: Wendy S. Goffe and Kim Kamin

Estate Planning and Elder Law Basics

An insightful and practical guide to family trusts *Family Trusts* is a step-by-step guide for anyone involved in family trusts: trust creators, trustees, beneficiaries, and advisors. It will help families create and administer a culture that recognizes trusts as a gift of love. Marrying the practical and emotional aspects of family wealth, this book provides a hands-on primer that focuses on fostering positive relationships, and structuring the trust appropriately for the situation and the people involved. It tackles difficult topics with frank and honest discussion, from the first beneficiary meeting to working with addictions, and more. Written by a team of experts in family wealth, this information is becoming increasingly crucial to the successful execution of a trust; you'll learn what type of person makes the best trustee, how to be an excellent beneficiary, and the technical aspects that help you build a better trust from the very beginning. There's been a staggering increase in trustee/beneficiary litigation and hostility, but that doesn't mean it's inevitable. Plenty of trusts are running smoothly, with positive experiences on all sides. This book shows you how to set up your trust to succeed from the start, with step-by-step guidance and expert insight. Express clear and thoughtful intent for the trust Create a healthy and supportive culture Select the right trustee, trust protector, and trust advisor Take the time to prepare before initially meeting the beneficiary Conduct a productive first meeting to set a tone for the relationship

Historically, there has been little consideration given to the culture of trusts, and this oversight may be a key driver of the behavior that's becoming more prevalent. *Family Trusts* explores the nature of these relationships, and shows you how to build a trust that retains the nature and spirit with which it was intended.

Estate Planning For Dummies

Plan ahead: estate planning to secure your wishes *Estate Planning* is your overview of the estate planning concepts that are necessary to consider when advising your clients about the different facets of wealth transfer planning. This fundamental reference presents the basic estate, gift, and trust planning ideas in a descriptive and accessible manner—allowing you to

easily and conveniently access the information you need when you need it. This essential text covers the development of estate planning strategies for your clients, the fundamentals of the federal transfer tax system, relevant federal income tax rules, lifetime donative asset transfers, gratuitous property transfers at death, generation-skipping transfers, special property transfer planning considerations, and post-mortem planning. When done effectively, estate planning enables your clients to make both lifetime and testamentary transfers of assets to beneficiaries of their choice. In the process, strategic, successful estate planning strategies conserve wealth for these beneficiaries, who are often family members of the client. Leveraging the right methods of estate planning can ensure that you achieve your client's objectives. Explore the fundamentals of estate planning as they relate to wealth transfer planning Dive into special property transfer planning considerations, including community property, life insurance, charitable transfers, closely held corporations, etc. Better serve your clients by having access to relevant, easy to navigate information on estate planning best practices Reinforce these new ideas with a comprehensive test bank Estate Planning is your guide to estate planning concepts that help you protect your assets during wealth transfer—and prepare for your assets to change hands as smoothly as possible.

8 Ways to Avoid Probate

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 New Jersey will help you glide through this complicated process. This new book has been adapted to offer Ohio 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 Jersey 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. New Jersey -specific information is offered throughout this

book, including: New Jersey 's probate code; New Jersey rules, regulations, and laws specific to estate planning; elements of a valid New Jersey will; planning your living will in New Jersey; explanations of New Jersey 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 New Jersey 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.

Estate Planning Basics

The most comprehensive estate planning book available, Plan Your Estate covers everything from basic estate planning to sophisticated tax-saving strategies for people with estates worth up to \$1,200,000 or more. The bestseller demystifies: -- probate avoidance -- living wills -- estate tax saving trusts -- funerals and burials -- federal estate and gift taxes -- charitable remainder trusts -- durable powers of attorney. The 5th edition includes investment standards for trustees, further discussions of AB trusts, and receiving foreign gifts. Plan Your Estate also features expanded coverage of individual retirement accounts, estate-planning for people in second marriages, the types of property one can leave -- including intellectual property and frequent flyer airline miles -- and much more. Good in all states except Louisiana.

Florida Estate Planning

Offers advice on estate-planning, identifies key documents, and explains the technical jargon.

Values-Based Estate Planning

Would you like to avoid probate and keep your financial affairs private? Are you interested in paying the minimum amount of estate and gift taxes? Estate Planning in Arizona is the reference you need. Written for Arizonans with little or no legal

experience, this book tells you what you need to know: The basics of wills and trusts Protecting your assets Appointing guardians for your children Health care directives and living wills Taking title to real estate . . . and much more! Providing you with a better understanding of the laws and issues involved in estate planning, this comprehensive, easy-to-understand book will help you to preserve wealth, protect your family, and create a winning succession plan.

Funeral Planning Basics

This book provides an introduction to the basics of estate planning and will make this area of the law more accessible to the nonspecialist.

Basic Estate Planning in Florida

[This book] 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 power of attorney, marital deductions, gift splitting, survivorship deeds, gift tax issues, generation skipping transfer tax, tax deferred accounts, and advanced directives. -- back cover.

Plan Your Estate with a Living Trust

Careful planning now will reduce the likelihood of problems in the future. For instance, a carefully structured estate plan will benefit your loved ones in many ways. Properly drafted wills and trusts can preserve assets for future generations, especially against the devastating cost of long term care. If you own a business, a succession plan will be invaluable to your family and any business partners. If you need to buy or sell a piece of property, a careful plan will protect your investment. Brian has practiced in Albany and Saratoga Counties, for these matters, a lawyer will be critical to your success. Consider The Bronshter Law Firm, P.C. We are led by attorney Brian H. Bronshter, who puts more than 25 years of experience behind every case. With locations in Albany and Saratoga Counties, we represent clients across New York's Capital Region and beyond.

SUZE ORMAN'S PROTECTION PORTFOLIO

This book was created to assist Minnesota attorneys who are new to the estate planning practice area. It combines the planning concepts that are mandatory to any estate planning practice with practical tips, practice cautions, and intake and

conveyance forms for use in client matters. This book will benefit attorneys who have not previously focused on the drafting of estate plans in Minnesota. From the initial client phone call to drafting effective distribution language and coordinating tax-qualified retirement accounts, this book walks the new estate planning practitioner through planning concepts and best practices for effective representation. The author is a respected and sought-after estate planning attorney who created a thriving law practice working exclusively with Minnesota families and their estate plans.

LexisNexis Practice Guide: Minnesota Estate Planning

Want to save your family money and hassle? Read this book! Probate court proceedings after a death can drag out and cost tens of thousands of dollars in attorney and court fees—money that would otherwise have gone directly to your loved ones. This topselling guide shows you the most effective ways to skip the probate process: name payable-on-death beneficiaries for financial accounts own property jointly leave real estate with transfer-on-death deeds use a living trust name the right beneficiaries for IRAs, 401(k)s, and other retirement plans, and use probate shortcuts for small estates. Completely updated, this edition includes the latest state laws on probate avoidance methods, and covers all the estate-related impacts of the recent changes to federal rules on retirement distributions.

Family Trusts

The Complete Guide to Planning Your Estate in New Jersey

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*.

Plan Your Estate

The Wall Street Journal Complete Estate-planning Guidebook

Personal Financial Planning

Estate planning, in plain English This book provides concise, straight forward, and easy to read information about the major components of estate planning - without going into endless detail about arcane options that apply only to the wealthy. Topics include: choosing beneficiaries estate planning by parents with minor children wills living trusts avoiding probate trusts for people in a second marriage, and planning for incapacity. Best-selling Nolo author Denis Clifford uses plain-English to make these estate planning issues easy to understand, and lets you know which tasks you can handle yourself, and when you'll need a lawyer's help.

We The People's Guide to Estate Planning

This expert, one-of-a-kind handbook shows you how to: Ensure that your inheritance instructions will be carried out -- the way you want them to be Protect your child's inheritance from creditors, ex-spouses, addictions, tax troubles, mismanagement, squandering, and other risks of loss Prevent family conflict that can arise when parents die and children divide the "family money" Leave more money to your children and grandchildren, and less to the IRS -- and understand the hidden cost of a "death tax" repeal

Estate Planning Made Easy

What does the Bible really say about money? About wealth? How much does God expect you to give to others? How does wealth affect your friendships, marriage, and children? How much is “enough”? There’s a lot of bad information in our culture today about wealth—and the wealthy. Worse, there’s a growing backlash in America against our most successful citizens, but why? To many, wealth is seen as the natural result of hard work and wise money management. To others, wealth is viewed as the ultimate, inexcusable sin. This has left many godly men and women confused about what to do with the resources God’s put in their care. They were able to build wealth using God’s ways of handling money, but then they are left feeling guilty about it. Is this what God had in mind?

The Complete Guide to Organizing Your Records for Estate Planning

Your California Wills, Trusts, & Estates Explained Simply

The Principles of Estate Planning, 2nd Edition is newly revised with updated information on the most current developments in the estate planning field, including ATRA-related tax changes, the use of the new ABLE accounts for medical expenses planning, information on the use of trust protectors, and planning techniques that can be used for newly recognized same-sex marriages. The book is a complete single-volume source that covers all aspects of estate planning, from the basic principles of property transfers to complex financial techniques that can be used to deal with a wide variety of client circumstances. The authors bring a wealth of experience in both professional and academic arenas that help students understand the concepts that are critical for achieving important professional designations as well building a successful practice with real-world examples of common estate planning problems. This textbook allows students to work with the most current information, thus helping to gain a better understanding of how to advise clients in the real-world using real numbers. Teach your students using the most up-to-date estate planning textbook on the market. The authors, Carolynn Tomin and Colleen Carcone, fully address all of the CFP(R) Certification Examination Principal Topics for Estate Planning. In addition to this on-target approach, Principles of Estate Planning features: - Content that is systematically organized into subtopics to help simplify the understanding and retention of complex material - "Chapter Contents" that outline the topics addressed in each chapter - "Learning Objectives" in each chapter that provide topic focus - "Client Situations" that present practice scenarios and illustrate the practical application of key concepts in client situations - "Practitioner Tips" that provide practical advice and guidance - "Practice Standards" that highlight the related steps in the financial planning process from CFP Board's "Standards of Professional Conduct" - Chapter summaries, key terms, and review questions that aid recall, retention, and review of the topics - And much more! . .

Beyond the Grave revised edition

The Legacy Journey

Estate planning has more procrastination, indecision, and inertia associated with it than any other area of planning. Affluent baby boomers, in particular, as the beneficiaries of the largest intergenerational transfer of wealth in history, have a daunting set of financial concerns with which to contend. Here at last is a step-by-step approach to estate planning that equips planners and financial advisors to help clients tackle this important process once and for all. Most clients understandably find planning concepts and strategies confusing, but most also have a fairly sound understanding of who and what is most important to them. These are the priorities from which to build the foundation of a successful estate plan. The seven principles explored in this book use personal values as a basis to form The Legacy Planning System. With this approach, advisors can:

- * Help clients discover and solidify their deepest values, convictions, and objectives relative to their money
- * Help clients express those values and objectives in a clearly written Family Financial Philosophy mission statement
- * Serve as the team leader in advising clients and clients other advisors on how to use the mission statement to direct the planning process

Clarifying your clients priorities and personal goals will enable you, as a trusted advisor, to simplify the planning process for clients, ensure their lifetime financial independence, and help them control their ultimate family and social capital legacies. Confronting issues of family dynamics, taxes, and financial situations not to mention accepting one's own mortality is difficult for many people. In addition, since estate planning often requires a shift in ownership of assets, clients feel an unsettling loss of privacy and control over their financial resources. Help your clients to overcome these obstacles and achieve their highest financial and philanthropic aspirations. They'll thank you for generations to come.

Praise for Values-Based Estate Planning "Scott Fithian's book provides planning professionals with new insights into the estate planning process. Most importantly, he stresses the individual and family benefits of philanthropy through the concept of social capital which should be a key element to the planner's inventory of client questions."--Charles W. Collier, Senior Philanthropic Advisor, Harvard University "This exceptional book empowers planners with a well-organized roadmap to lead wealthy clients to implementation of an estate plan expressing the client's own values. Scott Fithian's Legacy Planning System focuses the advisor on the critical importance to the estate planning process of helping clients identify and articulate their values and objectives. This useful volume makes those ideas available to a much broader audience, while broadening the subject with illustrations of effective employment of the methodology he has developed."--David Wheeler Newman, JD, LLM, Mitchell, Silberberg & Knupp LLP "Fithian's view of the complete person helps the advanced advisor avoid the typical limitations (hazards) of planning for wealthy families. The easy-to-understand and easy-to-follow methods help determine in-depth values of the client's total financial goals. His methods result in cementing valuable relationships with the most prized clients. Critical reading for CPAs, attorneys, insurance agents, or other advisors." —Jessica M. Bibliowicz, President and CEO, National Financial Partners "Scott's wealth optimization system is truly revolutionary. For the first time, affluent clients and their advisors can rely on a fully integrated system that spans all phases of wealth

accumulation, management, and transfer over time. An outstanding reference!"--Robert Keys, The Private Client Group

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