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Principles of Estate Planning, 3rd Edition Practical Guide to Estate Planning, 2023 Edition Estate Planning AARP Crash Course in Estate Planning Financial Planner's Guide to Estate Planning The Tools and Techniques of Estate Planning, 20th Edition Estate Planning for Financial Planners The Everything Wills & Estate Planning Book CFP Board Financial Planning Competency Handbook A Modern Approach to Wills, Administration and Estate Planning (with Precedents) Estate Planning For Dummies A Lawyer's Guide to Estate Planning Canadian Estate Planning Made Easy Estate Planning and Taxation: Chartered Life Underwriter Edition (2nd Ed.). Estate Planning and Taxation Trust Taxation Principles of Estate Planning, 2nd Edition (National Underwriter Academic) Estate Planning Complete Estate Planning - Gold Edition J.K. Lasser's New Rules for Estate and Tax Planning Estate Planning For Dummies Money Wisdom Estate Planning with Life Insurance Fundamentals of Estate Planning, Fifteenth Edition You Can't Take it With You Tools & Techniques of Estate Planning, 18th Edition A Guide to International Estate Planning CFP Board Financial Planning Competency Handbook The Tools & Techniques of Financial Planning The Tools & Techniques of Estate Planning for Modern Families, 2nd Edition Estate Planning Estate Planning in Louisiana, 4th Edition Supplement to Estate Planning Texas Estate Planning Secrets of Great Estate Planning Taxation and Estate Planning The Tools and Techniques of Estate Planning for Modern Families, 3rd Edition Estate planning and taxation : chartered life underwriter edition Cases in Financial Planning Get Your Ducks in a Row

A complete guide to planning an estate under today's taxrules When it comes to your estate--no matter how big or small it maybe--you shouldn't leave anything to chance. Proper planning isnecessary to protect both your assets and your heirs. EstatePlanning Law Specialist Harold Apolinsky and expert financialplanner Stewart Welch III know this better than anyone else, and inthe Revised and Updated Edition of J.K. Lasser's New Rules forEstate and Tax Planning, they offer valuable advice and solidstrategies to help you plan your estate under today's tax rules aswell as preserve your wealth. Packed with up-to-the-minute facts,this practical resource covers important issues, such as: * How new legislation will impact inheritances and trusts * Estate and generation-skipping tax planning * The role of wills, executors, and trusts * Treatment of charitable contributions * The do's and don'ts of gifting * Life insurance and retirement planning Filled with in-depth insights and expert advice, this book willshow you how to efficiently arrange your estate today so that youcan leave more to those you care about tomorrow. Often members of the public think that their estate needs are met simply by creating a will and holding assets jointly. What they do not realize is the many other tools available to them in the financial and legal fields, and advice sought in one field does not guarantee information flowing on tools used in the other. Uniquely, this book arms the general public with the knowledge to make intelligent choices among the many tools in both fields. 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. Designed to be used in an academic program, Estate Planning and Taxation presents a concise, integrated overview, highlighting the essence of concepts without confusing the reader with every technical qualification and reference - a problem which has impaired the readability of many books in the field. 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 official CFP guide for career excellence CFP Board Financial Planning Competency Handbook is the essential reference for those at any stage of CFP certification and a one-stop resource for practitioners looking to better serve their clients. This fully updated second edition includes brand new content on connections diagrams, new case studies, and new instructional videos, and a completely new section devoted to the interdisciplinary nature of financial planning. You'll gain insights from diverse fields like psychology, behavioral finance, communication, and marriage and family therapy to help you better connect with and guide your clients, alongside the detailed financial knowledge you need to perform to the highest expectations as a financial planner. The only official CFP Board handbook on the market, this book contains over ninety chapters that are essential for practitioners, students, and faculty. Whether a practitioner, student, or faculty member, this guide is the invaluable reference you need at your fingertips. Comprehensive, clear, and detailed, this handbook forms the foundation of the smart financial planner's library. Each jurisdiction has its own laws and regulations surrounding financial planning, but the information in this book represents the core body of knowledge the profession demands no matter where you practice. CFP Board Financial Planning Competency Handbook guides you from student to practitioner and far beyond, with the information you need when you need it. Planning for your family's future made easy! 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. Part of the popular Tools & Techniques Series and Leimberg Library, the 13th Edition of The Tools & Techniques of Financial Planning covers all aspects of financial planning, including cash and budget management, debt, education and retirement planning, tax and investment issues, risk management, estate planning and more. Complete with the key principles, processes and practices of financial planning, this must-have resource offers planners a well-organized approach for explaining financial planning strategies to clients while also ensuring the suitability of the products being offered. In addition to providing helpful charts, handy checklists, and insightful case studies, The Tools & Techniques of Financial Planning features: Clear, easy-to-read descriptions of all aspects of financial planning, including cash and budgeting issues, education and retirement planning, risk management, health cost management, and estate planning and tax issues In-depth discussions of fundamental concepts like time value of money, business law, and economic principles Ethical and practice standards for major professional organizations in the financial planning field Helpful examples show how concepts apply for real-world planning scenarios Detailed citations that provide jumping off points for more detailed research needs New in the 13th Edition: Updated tax and accounting information, including the 2017 Tax Cuts and Jobs Act Expanded coverage of practice standards and ethical considerations, including the new ethical rules for the CFP Board Updated insurance and risk management content, including the new commercial flood program Newly revised health insurance and health cost management topics cover the current marketplace for individuals and small businesses New chapter on state best interest requirements, including New York's Section 187 Topics Covered: Principles and Processes of Financial Planning Education and Retirement Planning Tax and Investment Issues Estate Planning The Planner-Client Relationship Practice Standards and Ethical Considerations Ethical Rules for the CFP Board Financial Planning Goals Planning for Special Needs Financial Planning Fundamentals Cash and Budget Management Credit and Debt Management Time Value of Money and Quantitative Analysis Legal Issues Wills and Trusts Related Disciplines Risk Management and Insurance Health, Disability, and Long-Term Care Insurance State Best Interest Requirements And More! See the "Table of Contents" section for a full list of topics As with all the resources in the highly acclaimed Leimberg Library, every area covered in this book is accompanied by the tools, techniques, practice tips, and examples you can use to help your clients successfully navigate the complex course of financial planning and confidently meet their needs. The Practical Guide to Estate Planning (2022) provides an overview of estate planning and covers a wide variety of principles and tools that range from simple to complex. The informative guide contains an extensive, well-annotated collection of forms and examples that appeal to new and experienced estate planners alike. It is published by Wolters Kluwer and is available for purchase in softcover format. Features of Practical Guide to Estate Planning (2022) Practical Guide to Estate Planning (2022) addresses the rules involved in estate planning and the various ways in which estates may be structured to help protect assets from taxation. The layout of this book reflects the authors' emphasis on simplicity and clarity. The book begins by providing a general overview of the estate planning process, including the rules involved in estate planning and various ways in which estates may be structured to achieve desired tax effects. It then goes on to discuss gifts and specialized areas of estate planning, including generation-skipping transfer tax rules and charitable planning with the use of private foundations and split-interest trusts. At the end of Practical Guide to Estate Planning (2022), you will find an extensive collection of estate planning forms and examples that allow you to access the information you need quickly and conveniently. Some of these forms and examples include: Living trust Irrevocable life insurance trust Annual exclusion trust Pour-over will Will with outright dispositions Codicil Living will Charitable remainder unitrust Durable power of attorne Health care proxy Qualified personal residence trust (QPRT) Grantor retained annuity trust (GRAT) The library of forms and examples serves as a quick reference guide that explains why and how various estate planning tools are implemented. The authors provide comprehensive annotations and alternative drafting options throughout. Benefits of Using Practical Guide to Estate Planning (2022) With its wealth of information and impressive assortment of forms and supporting materials, this guide offers something of interest for every tax professional. Its clarity and organization, augmented by well-constructed examples, practice tips, diagrams, and charts, make it a work that will be useful to both the newcomer and tenured tax practitioner. It was written by a respected group of authors with extensive experience in the field, including: Ray D. Madoff, J.D., LL.M. Cornelia R. Tenney, J.D., LL.M. Martin A. Hall, J.D. Lisa Nalchajian Mingolla, J.D., LL.M. By using Practical Guide to Estate Planning (2022), you will gain a better understanding of knowing when and why a certain estate planning tool should be used. You will also be able to serve your clients more effectively and make use of the full spectrum of estate planning tools available. Order Practical Guide to Estate Planning (2022) Today Wolters Kluwer interprets tax laws and provides tax and accounting professionals the best solutions possible to successfully navigate the ever-changing tax landscape. Order your copy online. 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! . . The Tools & Techniques of Estate Planning covers all aspects of estate planning, from behavioral and ethical issues to estate and gift tax planning, to planning for nontraditional couples and the risk of health issues for aging clients. With topics that are applicable for both large and small estates, this title enables estate planners to: Help clients plan every aspect of their estate, including tax, investment, insurance, and estate administration decisions; Help clients effectively preserve their assets under current law; Handle a wide variety of estates and specific circumstances; and Save significant amounts of time with exclusive estate planning tools. This book features easy-to-understand, real-world examples from expert authors on which techniques are best suited for a wide variety of circumstances, and equally important advice on how to avoid future problems. New in the 20th Edition: There have been several updates in tax legislation since the release of the prior edition, many of which affect estate planning. When rules change, every estate planner must stay completely up-to-date with all the opportunities--and pitfalls--arising from the new legislation. This edition features: Updates resulting from the SECURE Act, affecting qualified retirement plans; New information on COVID-19 related tax changes for employee benefit plans; Employee retention credit under the CARES Act; Coverage of new IRS valuation tables in addition to the prior valuation tables; Updated ERISA compliance and reporting requirements; and Updated tax information, including the new 2021 COVID-19 stimulus and CAA bills. Topics Covered: Practice of estate planning Choosing the right professionals for estate planning Ownership and transfer of property Estate, gift, GST, and income tax considerations for estate planning The use of revocable and irrevocable trusts in estate planning The use of life insurance in estate planning Planning for incapacity and special needs Valuations issues Charitable giving Using employee benefits to meet estate planning goals Intra-family wealth transfers and business succession planning And more! See the "Table of Contents" section for a full list of topics As with all of the resources in the highly acclaimed Leimberg Library, every area covered in this book is accompanied by the tools, techniques, practice tips, and examples you can use to help your clients successfully navigate the complex course of estate planning and confidently meet their needs. 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. For those financial planners who need to effectively manage the estate planning challenge for their clients. Enormous changes in the laws affecting the viability of estate planning have recently been enacted. And to help financial planners meet the challenge, author Paul J. Lochray presents this completely revised and updated third edition. Financial wellness invariably ranks among an individual’s top life pursuits. After all, with wealth (and health), we have the options to do what we really want to do with the people most significant to us. Nonetheless, considering the unceasing economic and market uncertainties that plague the world today, it is crucial, now more than ever, that people acquire money wisdom—clear, unvarnished and simple financial truths—to navigate through the minefields of misinformation and false promises in order to achieve financial security. In Money Wisdom, author and veteran financial adviser Christoper Tan distils his over 20 years of broad and penetrating insights—penned painstakingly in a series of articles and commentaries—to equip ordinary, working individuals and families with financial truths and tools. These include risk mitigation, insurance planning, retirement planning and personal finance, all of which are aimed at guiding readers to make purposeful life and financial decisions. Genuine, personal and comprehensive, Money Wisdom serves as a roadmap to inspire readers and even sophisticated investors to build meaningful and enduring financial wellness. The insightful counsel that peppers the pages of this book, oftentimes made only accessible to mainly institutional and affluent individuals, is now brought to the man in the street. Trust Taxation covers the taxation of UK resident and non-resident trusts explaining in detail the income tax, capital gains tax and inheritance tax treatment of the various different types of trusts. The book covers the tax consequences of creating and ending a trust, as well as the tax issues to consider during the lifetime of each type of trust and on distributions to beneficiaries. Part 1 contains an overview of trust law including recent case law on Hastings Bass, the categorisation of foreign entities, the new domicile and residence proposals and case law on residence and domicile generally. It also summaries the tax rules for foreign domiciliaries. Parts 2 to 4 explain the relevant legislation in detail as it relates to trusts, including discussion of entrepreneurs' relief, rollover relief, reservation of benefit, excluded property and relevant property trusts. Part 5 deals with special situations, including the family home, chattels, employee benefit trusts, pilot trusts, bare trusts, disabled trusts, will drafting, variations, business property relief and agricultural property relief, divorce and trusts. 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. A Lawyer's Guide to Estate Planning: Fundamentals for the Legal Practitioner, Fourth Edition is full of helpful information on all aspects of estate planning to ease any attorney through the process. The official CFP guide for career excellence CFP Board Financial Planning Competency Handbook is the essential reference for those at any stage of CFP certification and a one-stop resource for practitioners looking to better serve their clients. This fully updated second edition includes brand new content on connections diagrams, new case studies, and new instructional videos, and a completely new section devoted to the interdisciplinary nature of financial planning. You'll gain insights from diverse fields like psychology, behavioral finance, communication, and marriage and family therapy to help you better connect with and guide your clients, alongside the detailed financial knowledge you need to perform to the highest expectations as a financial planner. The only official CFP Board handbook on the market, this book contains over ninety chapters that are essential for practitioners, students, and faculty. Whether a practitioner, student, or faculty member, this guide is the invaluable reference you need at your fingertips. Comprehensive, clear, and detailed, this handbook forms the foundation of the smart financial planner's library. Each jurisdiction has its own laws and regulations surrounding financial planning, but the information in this book represents the core body of knowledge the profession demands no matter where you practice. CFP Board Financial Planning Competency Handbook guides you from student to practitioner and far beyond, with the information you need when you need it. The Tools & Techniques of Estate Planning for Modern Families, 3rd Edition discusses estate planning issues with a particular focus on how they apply 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, lifetime estate planning options, and more! Highlights of the 3rd Edition This newest edition has been completely revised, featuring several new and updated chapters including strategies to help clients plan for various scenarios. This edition provides valuable insights into the following areas: Clients in long-term polyamorous relationships Planning for single clients Clients with nonmarital children Client goals related to cryonics and cloning, including techniques for the creation of personal revival trusts Clients with intellectual property assets Clients' pet-related legacy goals Modern philanthropy trends in estate planning New technologies and trends in conception and their legal implications, including posthumously conceived children Updates to trust planning and income tax considerations in estate planning Planning for longer lifespans and fading capacity Digital assets and intellectual property, which may have a lifespan that exceeds its creator Written by experts in the subject matter, this publication is filled with practical advice and examples in an easy-to-understand language, helping you assist your clients in making the best decisions for themselves and for their families. 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 Lawyer and financial planner Michael T. Palermo explains everything you need to know about wills, trusts, and more. With the explosive growth in international investments, more and more lawyers and financial advisors realize the acute need to properly address critical issues of international estate planning for their clients. Whether you are counseling a foreign national or an American citizen, whether your practice is in the U.S. or abroad, whether you want to develop a general expertise in the area or are confronted by these issues on a more frequent basis, this compendium is a necessary and practical resource to help you identify and navigate many of the complex planning and regulatory compliance issues, both legal and tax, involved in international estate planning. In addition to providing a complete overview of the basic principles and procedures of international asset management from addressing the conflict of laws issues that are central in determining which country s laws will govern the disposition of a donor or decedent s wealth to the basic transfer tax rules for nonresident aliens, U.S. citizens, and resident aliens A Guide to International Estate Planning teaches proven strategies, techniques, and practical applications to use for meeting your clients international estate planning needs. Twenty-two detailed chapters are written by trust and estate lawyers with significant experience in international issues. Their advice goes beyond simply highlighting issues in estate planning, emphasizing key issues as compliance, treaty, choice of law, and estate administration problems. This updated edition now includes chapters on FATF and anti-money laundering and offshore compliance, as well as chapters from several foreign jurisdictions to provide comparative insights on different topics." Most Americans donÆt have a will. They avoid estate planning because they donÆt want to think about death or they think itÆs too complicated. But this easy-to-follow guide takes the mystery out of the process. This book shows readers how easy it can be to plan for security and peace of mind. Readers learn how to write a will, create an estate plan, designate executors, choose trusts, reduce tax liabilities, and distribute their assets. Other features include: A glossary of legal terms Advice for protecting families from creditors Guidance for unmarried partners The important role of charitable giving in your estate plan This book provides sound advice for planning retirement and managing assets at any age and income level. It also includes completely new information on: Updated tax, IRA, and Roth details Charitable giving opportunities for reducing taxes and leaving a legacy Instruction for keeping plans up to date as the readers age An estate planning checklist The NEW 6th edition to be released late 2015 Since it was first published ten years ago, You Can't Take It With You has been a trusted source of advice on estate planning, and it is more relevant today than ever. The Canadian population is aging, billions of assets are set to be transferred to the next generation over the coming decade, and estate planning is quickly becoming the single biggest financial planning issue of the next ten years for baby boomers and their parents. Estate planning is everybody's issue. If you don't plan for what happens to your money, your children, your house and other assets upon your death, the government will make those decisions for you. In these turbulent financial times, planning for the future is more

important than ever, especially when it involves the financial security of those you love. Completely revised and updated in its fifth edition, this national bestseller continues to be the definitive resource on the financial, legal and human issues around estate planning. * Covers all areas of estate planning: financial and tax planning, wills and powers of attorney, life insurance, guardianship of your children, trusts and living wills, and funeral planning, as well as new information on current legislation and emerging trends such as estate mediation, and much more. * Prepares you for dealing with your financial adviser or lawyer--and may even help you to save hundreds of dollars in professional fees and taxes. * Features practical examples, tips, and question-and-answer boxes. 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® 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! Many Louisiana residents want to develop an estate plan that will make things easy for themselves and their loved ones without painful and costly legal proceedings, unnecessary taxes, and family conflict. This book will explain the latest legal strategies and techniques that will allow you to protect your hard-earned assets, avoid uncertainty, and make estate settlement simple.In this book, you will learn how to:* Avoid potential delays and expenses of probate* Shield your assets from nursing home costs* Preserve your entire estate for children and grandchildren* Make your wishes known during incapacity* Protect children's inheritance from divorce and creditors, and much moreThis book could save you and your loved ones unnecessary legal fees, taxes and other costs. Written by leading lawyers in the field, this popular guide to the tax-efficient drafting of wills, estate planning and administration provides practitioners with help and guidance on everyday estate planning and will drafting and discusses the typical problems and pitfalls that may be encountered in practice. The precedents have been carefully selected to deal in a straightforward fashion with common needs of clients. The book begins by looking at the essential legal framework of wills, trusts and taxation through a combination of detailed and authoritative commentary, worked examples and expertly drafted precedents. It then examines specific topics including: transferable nil rate band, using IPDIs, provision for children, pilot trusts, gifts, APR and BPR, obtaining the grant, instruments of variation and disclaimer, constituting and administering the will, and tax efficient administration. This edition has been

extensively revised and includes four new chapters: Notes for the Will Draftsman Gifts to Charity and the Reduced IHT Rate Obtaining the Grant Constituting and Administering the Will The authors' narrative commentary is supplemented by 40 precedents which are included on an accompanying CD-ROM, allowing users to download and adapt each document as necessary.

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