Estate Planning 5th Edition

Elderly Clients: A Precedent Manual will assist the private client adviser tackle a comprehensive range of issues affecting the elder client including the difficult and ever-changing problems of planning for their client's possible incapacity in later life, sharing residential accommodation, care contracts, social security agents and appointees, funeral planning, receivership, wills and equity release schemes. A wealth of expertly drafted precedents covering the whole range of matters that might arise is included. Checklists assist the adviser in such matters as registering an Enduring Power of Attorney and establishing whether the client has authority to make a will or gift.
This practical book helps survivors to care out all the legal, financial, and practical tasks that must be handled after a person's death. It also contains "planning ahead" sections that explain how to arrange one's own affairs.
Multistate and Multinational Guide to Estate Planning analyzes the legal aspects of individual wealth transfers across state and national boundaries. In addition, the Guide seeks to develop workable strategies for the attorney involved with a multijurisdictional client.
A mine of information and expertise packed with valuable practice tips; this is the most current and comprehensive single-volume estate planning resource available. Providing theoretical grounding and a practice-oriented approach, Price shows how to handle the full range of estate planning problems and techniques.
How to Maximize Your Family's Assets and Protect Your Loved Ones
How to Maximize Your Family's Assets and Protect Your Loved Ones, Fifth Edition
Principles and Problems
Law of Estate Agency
Estate Planning
Your Living Trust & Estate Plan

Using an effective “learn by doing” approach, Wills, Trusts, and Estates for Legal Assistants emphasizes examples and applications, and includes hundreds of real life situations with detailed explanations. Students understand what the rules of law mean and how they apply in a real world context. The complete topic coverage introduces wills and trusts, intestate succession, estate administration, nonprobate transfers, and other estate planning issues such as taxes and malpractice. A balanced, experienced author team skillfully blends theory with practice and extensive pedagogy reinforces the text, with marginal terms and a glossary, ethical points, checklists, practice tips, and sample forms. The instructor's manual provides a summary of chapters, a model course outline, exam questions, assignment ideas, exercises, and a research guide for wills, trusts, and estates. New to the Sixth Edition: The impact of the Tax Cuts and Jobs Act on federal income, gift, estate, and generation-skipping transfer taxes Rights and liabilities of same-sex spouses Electronic wills and access to a decedent’s digital assets Techniques for demonstrating testamentary capacity Directed trusts and trusts authorizing trustees to consider environmental, social, and governance factors in making investment decisions Modifying the terms of an irrevocable trust by “decanting” Professors and students will benefit from: lively, lucid, and conversational style grabs and holds students’ interest learning-by-doing approach gives students a concrete grasp of abstract concepts Practice Tips guide students through the critical process of preparing and managing files flexible structure allows professors to follow the presentation of concepts in the book or organize the chapters to fit their syllabus

Current, relevant estate, retirement and tax planning strategies with expert insight and advice JK Lasser's New Rules for Estate, Retirement and Tax Planning is the authoritative guide to estate, retirement and tax planning, fully updated to reflect new changes and legal updates. Written by some of the most recognized experts in the field, this book offers useful planning advice for people of various ages and income levels, including information on retirement planning, trusts, charitable contributions, gifts, life insurance, and wills. In this guide, you'll find up-to-the-minute facts, valuable insight, and solid strategies to help you preserve your wealth and plan your estate under current tax rules. The helpful companion website provides spreadsheets, tools, and additional reading to help you get organized, while the book's expert guidance provides the background information you need to prepare properly. Estate planning is a complex topic, made even more complex by constantly changing laws. Failing to plan properly can result in your loved ones losing out on much of your hard-earned assets, and researching the topic on your own can be a minefield of assumptions, misunderstandings, and potential legal consequences. New Rules for Estate, Retirement and Tax Planning helps you sidestep the confusion, distilling the information down to what's relevant and current. This practical resource covers a wealth of important issues, including: Estate planning, taxation, and investing for maximum growth The role of wills, executors, and trusts, and how to treat charitable contributions Life insurance, retirement planning, Social Security claiming strategies and the do's and don'ts of gifting Business planning, including succession, asset protection, and family limited partnerships You've worked hard your entire life. You managed to accumulate assets. New Rules for Estate, Retirement and Tax Planning will help you maximize the transfer of your assets to the people and charities you love rather than the federal government in the form of taxes.

Offers practical tips on estate planning, featuring a chapter on Medicaid and sharing vital information on how to save heirs the cost and delay of probate
The most critically-acclaimed guide to preparing a will available.
Harris 5th Edition New York Estates
Proposal Planning & amp;Writing, 5th Edition
A Modern Approach to Lifetime Tax Planning for Private Clients (with Precedents)
Price on Contemporary Estate Planning
How to Avoid Probate
Elderly Clients

2016 Edition CFP Certification Exam Flashcard Review Book: Estate Planning provides bound flashcards to help you prepare for the CFP Certification Exam. Inside this innovative flashcard book you will find exam topics featured on the front of each page, with detailed explanations and analysis located on the back. The convenient bound design means you no longer need to carry hundreds of loose, bulky flashcards that can be misplaced or destroyed. This fully indexed book serves as a portable reference for quick study, efficient review, and easy reference. Written by the author of "Your Guide to the CFP Certification Exam" and "CFP Certification Exam Practice Question Workbook" CFP Estate Planning Topics Include: - Estate planning documents - Forms of property ownership - Generation-skipping transfer tax (GSTT) - Gift and estate tax compliance - Gifting strategies - Incapacity planning - Postmortem estate planning - Powers of appointment - Sources of estate liquidity - Transferring property at death - Trusts

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

The 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.

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, 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 the 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, instruments of variation and disclaimer, and tax efficient administration.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.
Ernst & Young's Personal Financial Planning Guide
Wills and Estates
Examples and Explanations
Prepare Your Own Will
A State and Territorial Summary of Will and Intestacy Statutes
A Precedent Manual

This revised fifth edition from estate-planning expert Harvey J. Platt details the most up-to-date strategies for using a living trust to create a flexible estate plan. Platt explains the latest tax laws, including the American Taxpayer Relief Act of 2012, the broadening of statutes for amending trusts, and the rule against perpetuities (RAP). Platt also addresses updates on many existing topics, including lifetime exemptions; the estate, gift, and generation-skipping tax; charitable deductions; state estate tax savings; and private annuities. Your Living Trust & Estate Plan maps out the most effective techniques for saving money and property and covers the essentials of successful estate planning. Other resources frequently overlook vital areas such as unlocking the benefits of living trusts, protecting beneficiaries, using life insurance, handling retirement benefits properly, and fixing inadequate estate planning postmortem, but Your Living Trust is the complete guide. This invaluable resource will teach you how to maximize your family’s assets, plan your estate, and provide for your loved ones well into the future.

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 DraftsmanGifts to Charity and the Reduced IHT RateObtaining the GrantConstituting and Administering the WillThe 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.

Covering the five key areas of financial planning, this guide emphasizes its technical, tax, and regulatory aspects. The areas of discussion include investments, employee benefits and retirement plan assets, insurance, income tax and estate planning, and regulatory issues.

Not every book merits a fifth edition! An invaluable resource, this thorough and detailed guide will enable anyone charged with grantseeking to submit winning proposals. • Offers advanced writing tips highlighting technological tools that will help writers work smarter, not harder, to increase proposal persuasiveness • Includes an expanded presentation of logic models that graphically display the relationship between situation, processes, and resulting outputs and outcomes • Features a new chapter on sustainability, complete with sample language to help grantseekers answer the dreaded question, "How will your project be sustained beyond the granting period?" • Shares practical tips that have enabled the authors to write winning grants for four decades

Asset Protection in Florida
The Wills and Estate Planning Guide
Your Living Trust and Estate Plan 2012-2013
A Legal, Financial, and Practical Guide
Wills, Trusts, and Estates
Lawyer's Guide to Estate Planning

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.

The fourth edition features fully updated chapters plus new chapters on Jersey foundations, Quebec, Hong Kong, Singapore, Israel, what it means to be a fiduciary, Islamic (waqf) trusts, and trusts in relation to divorce, among others. The new edition, produced in association with STEP.

This 5th edition of Commonwealth Caribbean Property Law sets out clearly and concisely the central principles of the law of real property in the region, guiding students through this core but often complex subject area. Fully revised and updated to include important new case law from the various Caribbean jurisdictions, the book provides comprehensive coverage of the key topics studied by undergraduates, including co-ownership, leaseholds, condominium, restrictive covenants, easements, mortgages and adverse possession. Emphasis is on those areas that are most commonly litigated in the region, and the book contains discussion of, or reference to, many unreported cases. This new edition features expanded coverage of freehold estates, a glossary of key terms, and a new question and answer section at the end of the book. Commonwealth Caribbean Property Law is essential reading for LLB students in Caribbean universities and students on CAPE Law courses and, with its analysis of the substantive laws across several jurisdictions, it will continue to be an invaluable reference tool for legal practitioners in the region.

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.

The Tools and Techniques of Estate Planning, 20th Edition
Commonwealth Caribbean Property Law
Estate Planning (5th Edition)
A Practical Guide for Estate and Financial Service Professionals
CFP Certification Exam Flashcard Review Book
You Can't Take it With You

Using practical, self-contained chapters, this text provides an overview of wills, trusts, and estates and can easily support a variety of programs and audiences. Designed with flexibility in mind, it captures the complexities of the field, while maintaining a clear tone that is accessible and concise. Throughout the text, core concepts are reinforced by illustrations, charts, tables, and cases. This edition features updated case materials and statutes, updated statistics, more review questions and projects, summarized appellate court cases and earlier coverage of non-traditional families.

Written in easy-to-read language with dozens of real-life examples, this book provides important information about mediation, arbitration, small claims court, and civil court procedures, and includes a chapter on working with a lawyer.

Asset Protection in Florida covers all facets of asset preservation for Florida residents. The Fourth Edition manual provides comprehensive analysis of the many steps available to protect assets from creditors' claims, both during your lifetime and at death. Among the many topics covered are homestead, trusts (both domestic and offshore), business planning, planning for dissolution of marriage, protection of retirement and education accounts, and the ethical aspects of advising clients on asset protection issues. Bankruptcy issues and tax planning are prominently featured throughout the text. The eBook versions of this title feature links to Lexis Advance for further legal research options.

Covers the essentials of estate planning, details strategies for using a living trust to create a flexible estate plan, and explains the changes to the tax laws.

What to Do When Someone Dies

Trusts in Prime Jurisdictions

Langer on Practical International Tax Planning: Focus on tax planning

Fifth Edition

Financial Planning Answer Book 2009

Multistate and Multinational Estate Planning

"The fifth edition of Wills and Estates thoroughly examines the law and practice surrounding estate planning, administration, and litigation. Each of these areas is approached from all angles, beginning with a discussion of legal fundamentals that lays the foundation for the in-depth exploration of the complexities of legal practice that follows."--

This book discusses in detail the law relating to the fiduciary duties owed by directors and employees to companies which is complex and involves several overlapping areas of law. It is, however, a relatively commonplace cause of action; individuals in positions of trust within a company are often tempted to abuse their position in order to commit fraud, steal company assets or secrets, set up in competition, and poach staff and customers.This new edition of Fiduciary Duties: Directors and Employees contains commentary on a number of new cases alongside further commentary and analysis on the developing jurisprudence in relation to the fiduciary duties of LLP members and joint venturers.There have been substantial developments in the law since the first edition, including a number of important decisions of the House of Lords and Supreme Court which are the subject of sustained treatment. This new edition of Fiduciary Duties: Directors and Employees is an essential research reference for anyone practising in this area of the law.Highlights from the new edition:• Commentary on the numerous important cases decided since the 1st edition;• Analysis on the emerging differences between statutory duties under the Companies Act 2006 and fiduciary duties owed by employees in light of Customer Systems v Ranson• Comparative commentary on the developing jurisprudence in relation to the fiduciary duties of LLP members and joint venturers • Analysis of recent jurisprudence on de facto and shadow directors in light of HMRC v Holland• Substantial reconsideration of remedies in the light of FHR v Cedar, AIB v Redler, Novoship v Mikhaylyuk, Prest v Petrodel, Imageview v Jack and the development of Wrotham Park damages• Analysis of attribution of knowledge and the fraud exception in the light of Stone & Rolls v Moore Stephens and Bilta v Nazir• Consideration of confidential information in light of Vestergaard Frandsen v Bestnet and "Bolkiah" injunctions following Generics v Yeda• Analysis of limitation following Williams v Central Bank of Nigeria

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.

If you want to take control of your financial future and unlock thedoors to financial success, you must have a plan that will allowyou to find good investments, reduce taxes, beat inflation, andproperly manage money. Whether you're new to financial planning or a seasoned veteran,this updated edition of Ernst & Young's Personal FinancialPlanning Guide provides valuable information and techniques you canuse to create and implement a consistent personalized financialplan. It also takes into consideration the new tax rules thataffect home ownership, saving for college, estate planning, andmany other aspects of your financial life. Filled with in-depth insight and financial planning advice, thisunique guide can help you: * Set goals * Build wealth * Manage your finances * Protect your assets * Plan your estate and investments It will also show you how to maintain a financial plan inconjunction with life events such as: * Getting married * Raising a family * Starting your own business * Aging parents * Planning for retirement Financial planning is a never-ending process, and with Ernst &Young's Personal Financial Planning Guide, you'll learn how totailor a plan to help you improve all aspects of your financiallife.

Wills, Trusts, and Estates for Legal Assistants

A Modern Approach to Wills, Administration and Estate Planning (with Precedents)

Estate Planning with Life Insurance

Common-Sense Estate Planning for Canadians

Estate Planning, 5E

The National Will Kit

Since its first publication in 1975, John Murdoch's Law of Estate Agency has been the leading work on this important subject. This new fifth edition offers authoritative guidance on all recent legal developments, both legislative and in the courts, of concern to practising estate agents. Judicial decisions on such matters as commission claims and liability for misdescription are of great concern to practitioners, as is the increasing tendency of clients to defend an action for fees by claiming that the agent's terms of business contravene consumer protection rules inspired by the EU. These developments, and many more, are given expert coverage.

Dealing with the legal and tax aspects of the sale and purchase of companies and businesses - and with the key commercial issues which arise from such transactions - this text outlines various points of view from the perspectives of both the buyer and seller.

In addition to the wide range of quality textbooks specially created for paralegal programs, Aspen Law & Business also offers a number of law school resources that you may find suitable for use in your course area.Each book in this popular series offers a winning combination of text, examples, and explanations as it guides students to a more thorough understanding of the subject at hand.

Examining more than 50 tax-advantaged territories around the world, PLI's Langer on Practical International Tax Planning gives you the current knowledge and savvy advice you need to help clients capitalize on ripe tax havens and financial centers.

Multistate and Multinational Estate Planning 2008

The American Bar Association Guide to Wills & Estates

The Tools and Techniques of Estate Planning

Everything You Need to Know About Wills, Estates, Trusts, & Taxes

Trust Taxation

Estate Planning and Taxation

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.

Multistate and Multinational Guide to Estate Planning analyzes the legal aspects of individual wealth transfers across state and national boundaries. In addition, the Guide seeks to develop workable strategies for the attorney involved with a multijurisdictional client. Planning is a central concern of Multistate and Multinational Guide to Estate Planning. The set is divided into six parts. The first is an overview of the topic. Part II is concerned with professional issues, particularly malpractice problems across state and national lines. Part III investigates the ties that influence which law is chosen to resolve legal questions that arise in the multijurisdictional setting. Part IV addresses specific restrictions on testamentary freedom. Part V deals with the intricacies of choice of law involving wills, trusts and estates. Part VI addresses tax matters at the multistate and multinational levels.

Sale of Shares and Businesses

Fundamentals for the Legal Practitioner

JK Lasser's New Rules for Estate, Retirement, and Tax Planning, 5th Edition

Searching the Law, 3d Edition

Wills, Trusts, and Estates Administration