Strategies For Trusts And Estates In Florida Leading Lawyers On Monitoring Current Trends Preventing Litigation And Determining The Best Estate Planning Strategy Inside The Minds

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GIDEON HARRY

JK Lasser's New Rules for Estate, Retirement, and Tax Planning John Wiley & Sons
Strategies for Trusts and Estates in Florida provides an authoritative, insiders perspective on key strategies for advising trust and estate clients in Florida in todays social and economic environment. Featuring partners from some of the states leading law firms, these experts guide the reader through the various elements of estate planning and the key issues to be considered during each stage of the process. These leaders reveal their advice on choosing the right trust for a specific client, protecting assets and retirement accounts for beneficiaries, and navigating the restrictions unique to Florida trust and estate law. From misunderstandings and miscommunications with clients to errors made while drafting documents, these authors discuss how to overcome common mistakes and pitfalls that some attorneys might face. Additionally, these top lawyers offer tips on educating clients about estate tax. The different niches represented and the breadth of perspectives presented enable readers to get inside some of the great legal minds of today, as these experienced lawyers offer up their thoughts around the keys to navigating this ever-evolving area of law.
Leading Lawyers on Analyzing Recent Developments and Navigating the Estate Planning Process in Florida Aspatore Books
International Estate Planning Strategies provides an authoritative, insiders perspective on key strategies for aiding US and international clients in developing comprehensive estate plans. Featuring partners from some of the nations leading law firms, these experts guide the reader through the process of getting to know the client and gathering all the necessary information before drafting a plan. These top lawyers offer their advice for collaborating with a team of advisors, developing innovative strategies, and ensuring all of the clients assets are incorporated. From minimizing taxation to dealing with foreign trusts, these authors discuss the steps for creating and updating effective international estate plans. Additional topics include the importance of increased transparency and staying up-to-date on changes in the area of trusts and estates. The different niches represented and the breadth of perspectives presented enable readers to get inside some of the great legal minds of today, as these experienced lawyers offer up their thoughts around the keys to success within this ever-evolving field.
Estate Planning For Dummies Aspatore Books
Strategies for Trusts and Estates in New York provides an authoritative, insiders perspective on the estate planning practice in the state of New York. Featuring experienced partners from leading law firms across the state, these experts guide the reader through the process of gathering necessary financial and familial information, designing wills, and adapting estate planning tools based on client demographics. These top lawyers offer specific advice on educating clients on the estate planning process and addressing misconceptions about tax laws as they apply to family members. From designing client-specific trusts to developing appropriate planning tools, these experts discuss the importance of carefully evaluating client situations and staying aware of changing client demographics. The different niches represented and the breadth of perspectives presented enable readers to get inside some of the great legal minds of today, as these experienced lawyers offer up their thoughts on the keys to success within this evolving field.
New Opportunities--new Strategies Aspatore Books
Strategies for Trusts and Estates in New York is an authoritative, insiders perspective on best practices for estate planning in the state of New York. Featuring partners and shareholders from some of the states leading law firms, these experts guide the reader through the recent developments in New York trusts and estates law, including significant changes to the federal applicable exclusion amount, the durable power of attorney, the revocatory effect of divorce, and the simultaneous death statute. From using estate tax exemptions and implementing a lifetime gift-giving program to creating a grantor trust, the authors emphasize the importance of protecting a clients assets and building an estate plan that meets the clients needs. Additionally, these leaders provide insight into the changing role of the estate planning attorney and the integration of new laws, as well as the effects of the financial crisis, same-sex marriage equality, and the increase in financial elder abuse. The different niches represented and the breadth of perspectives presented enable readers to get inside some of the great legal minds of today, as these experienced lawyers offer up their thoughts around the keys to navigating this ever-evolving area of law.
Leading Lawyers on Analyzing Recent Developments and Navigating the Estate Planning Process in New York (Inside the Minds) Aspatore Books
Best Practices for Structuring Trusts & Estates is an authoritative, insider?s perspective on key strategies for estate planning. Featuring partners and shareholders from some of the nation?s leading firms, these experts guide the reader through the unique nuances of trusts and estates law, including the complications of negotiating and settling family-related estate disputes, managing risk, contesting trusts or wills, and planning for wealth transfer. These top lawyers reveal their strategies for a variety of legal issues, such as the disposition of assets and succession planning, federal and state estate and income tax planning, the establishment of a protective conservatorship, and no-contest clause litigation. From creating successful client relationships and adding direct financial value to weighing the benefits and detriments of settling versus negotiating and staying up-to-date with new legislation, these authors delve into the importance of being a ?family advisor? for clients faced with challenges and difficult decisions. The different niches represented and the breadth of perspectives presented enable readers to get inside some of the great legal minds of today, as these experienced lawyers offer up their thoughts around the keys to success an increasingly-enforced and rapidly-changing area of law.Inside the Minds provides readers with proven business intelligence from C-Level executives (Chairman, CEO, CFO, CMO, Partner) from the world?s most respected companies nation-wide, rather than third-party accounts from unknown authors and analysts. Each chapter is comparable to an essay/thought leadership piece and is a future-oriented look at where an industry, profession, or topic is headed and the most important issues for the future. Through an exhaustive selection process, each author was hand-picked by the Inside the Minds editorial board to author a chapter.Chapters Include:1. Steven P. Cole , Shareholder and Vice President, McAfee & Taft - "A Picture of Trusts and Estates Law";2. John F. Shoro, Partner and Estate, Financial, and Tax Planning Practice Group Leader, Bowditch & Dewey LLP - "The Importance of Family and Giving Them a Sound Financial Future";3. Sandra Brown Sherman , Partner, Riker, Danzig, Scherer, Hyland & Perretti LLP - "Trying to Create a Win-Win Situation";4. Gary A. Zwick, Partner, Walter & Haverfield LLP - "Finding a Way to Say ?Yes?";5. Joseph D. Zaks , Partner, Roetzel & Andress LPA - "Estate Planning: More than Wills and Trusts";6. G. Henry Welles, Partner, Best Best & Krieger LLP - "Trust and Estate Litigation in California."
From the Basics to Advanced Strategies Aspen Publishers
Current, relevant estate, retirement and tax planning strategieswith expert insight and advice JK Lasser's New Rules for Estate, Retirement and TaxPlanning is the authoritative guide to estate, retirement andtax planning, fully updated to reflect new changes and legalupdates. Written by some of the most recognized experts in thefield, this book offers useful planning advice for people ofvarious ages and income levels, including information on retirementplanning, 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 yourwealth and plan your estate under current tax rules. The helpfulcompanion website provides spreadsheets, tools, and additionalreading to help you get organized, while the book's expert guidanceprovides the background information you need to prepareproperly. Estate planning is a complex topic, made even more complex byconstantly changing laws. Failing to plan properly can result inyour loved ones losing out on much of your hard-earned assets, andresearching the topic on your own can be a minefield ofassumptions, misunderstandings, and potential legal consequences.New Rules for Estate, Retirement and Tax Planning helps yousidestep the confusion, distilling the information down to what'srelevant and current. This practical resource covers a wealth ofimportant issues, including: Estate planning, taxation, and investing for maximumgrowth The role of wills, executors, and trusts, and how to treatcharitable contributions Life insurance, retirement planning, Social Security claimingstrategies and the do's and don'ts of gifting Business planning, including succession, asset protection, andfamily limited partnerships You've worked hard your entire life. You managed to accumulateassets. New Rules for Estate, Retirement and Tax Planningwill help you maximize the transfer of your assets to the peopleand charities you love rather than the federal government in theform of taxes.
Strategies and Solutions Strategies for Trusts and Estates in New YorkLeading Lawyers on Protecting Clients' Assets, Determining the Best Estate Planning Strategy, and Adapting to New Laws and Trends
Estate Planning Client Strategies provides an authoritative, insiders perspective on key tips for developing estate plans to best meet client needs. Featuring experienced partners from law firms across the nation, these experts guide the reader through some of the common challenges facing trusts and estates lawyers in todays legal climate. These top lawyers offer advice on creating business succession plans, utilizing trusts to protect client assets, and navigating the uncertainty surrounding the federal estate tax. From shifting family dynamics to recent developments in the law, these experts reveal proven strategies for drafting estate plans that are flexible enough to provide for the possibility of unanticipated changes in the future. Additionally, these leaders discuss issues that commonly arise in probate and comment on how probate can be a useful device to resolve various legal issues. The different niches represented and the breadth of perspectives presented enable readers to get inside some of the great legal minds of today, as these experienced lawyers offer up their thoughts on the keys to success within this ever-evolving area of law.
Best Practices for Structuring Trusts and Estates Simon and Schuster
Strategies for Trusts and Estates in California provides an authoritative, insiders perspective on best practices for handling the estate planning process in the state of California. Featuring partners from some of the states leading law firms, these experts guide the reader through the different phases of creating an estate plan, including evaluating a new client, choosing the right type of trust, updating an estate plan, and understanding the consequences of a poorly drafted trust. From keeping up-to-date on relevant decisions in this area of law to understanding the common issues and concerns that face California residents, these authors emphasize what is needed to determine the best estate planning strategy for your client.

Additionally, these leaders discuss the key concerns of surviving family members and beneficiaries and offer advice on the common mistakes and pitfalls in this practice area. The different niches represented and the breadth of perspectives presented enable readers to get inside some of the great legal minds of today, as these experienced lawyers offer up their thoughts around the keys to navigating this ever-evolving area of law.

Strategies for Trusts and Estates in New York, 2015 Ed John Wiley & Sons

Trusts and Estates Legal Strategies is an authoritative, insiders perspective on successfully drafting and executing estate plans. Featuring partners and chairs from some of the nations leading law firms, these experts discuss strategies for understanding a clients objectives, analyzing and planning a strategy, and implementing and monitoring an estate plan. From educating the client and determining the clients goals to executing legal strategies, these authors discuss credit shelter planning, transfer tax, gift tax, GST tax exemption, and more. The different niches represented and the breadth of perspectives presented enable readers to get inside some of the great legal minds of today as these experienced lawyers offer up their thoughts around the keys to success within this dynamic field.

Strategies for Trusts and Estates in New York Aspatore Books

The misconceptions surrounding the last will and testament need to be put to rest: Wills benefit lawyers. Trusts benefit you. Period. Too often lawyers sell wills to clients only to sit back and wait to sell their probate services to their client' s heirs. Modern estate planning should utilize the Living Trust as the effective, efficient, and inexpensive alternative to a will. Living Trusts for Everyone: Why a Will is Not the Way to Avoid Probate, Protect Heirs, and Settle explains why wills are not the best way to handle an estate and details the many advantages trusts have over wills in not only eliminating probate, but protecting your assets for your heirs. Anyone with minor children, disabled beneficiaries, blended families, or spendthrift heirs must have a trust to be sure the assets left behind are put to good use, and that your intentions are carried out. Lawyers may have vested interests in perpetuating the probate system, but this book will explain why legal services are not needed to do the clerical work in settling a trust after death. No legal jargon or confusing double-speak, just specific step-by-step instructions and sample form letters to settle a trust are included to take the mystery out of the process. This is not a do-it-yourself book and it doesn't try to cram every type of trust onto its pages. Living Trusts for Everyoneexplains in specific terms what benefit a trust will have for you and gives you the tools to settle a loved one's trust with no lawyers and no expense. For those who already have a trust, there is a list of what to look for to see if your trust is any good, or if it needs to be updated. Trust seminars are examined with warnings on what to look out for in setting up your trust. Everyone who cares about what happens to their assets at death should read Living Trusts for Everyone: Why a Will is Not the Way to Avoid Probate, Protect Heirs, and Settle! Allworth Press, an imprint of Skyhorse Publishing, publishes a broad range of books on the visual and performing arts, with emphasis on the business of art. Our titles cover subjects such as graphic design, theater, branding, fine art, photography, interior design, writing, acting, film, how to start careers, business and legal forms, business practices, and more. While we don't aspire to publish a New York Times bestseller or a national bestseller, we are deeply committed to quality books that help creative professionals succeed and thrive. We often publish in areas overlooked by other publishers and welcome the author whose expertise can help our audience of readers.

Strategies for Trusts and Estates in New York, 2013 Ed Aspatore Books

Best Practices for Structuring Trusts and Estates provides an authoritative, insiders perspective on helping clients develop appropriate estate plans in light of recent trends and new legislation, such as the American Taxpayer Relief Act of 2012. Featuring experienced partners from law firms across the nation, these experts guide the reader through changes to gift taxes, new portability rules, and types of trusts in estate planning. These top lawyers offer specific advice on helping clients choose a trustor and trustee, utilizing mediation to address potential issues, and updating strategies to comply with changes in legislation. From avoiding probate to dealing with the familial and financial needs of the client, these experts identify common challenges in estate planning, and stress the importance of developing a strong attorney-client relationship. The different niches represented and the breadth of perspectives presented enable readers to get inside some of the great legal minds of today, as these experienced lawyers offer up their thoughts on the keys to success within this rapidly-changing legal field.

Leading Lawyers on Protecting Assets, Meeting the Needs of Today's Clients, and Understanding the Impact of Recent Federal Estate Tax Issues Aspatore Books

Strategies for Trusts and Estates in New York provides an authoritative, insiders perspective on the current estate planning practice in New York State. Featuring experienced partners from law firms across the state, this book guides the reader through the latest developments that affect trusts and estates practitioners, including ongoing changes to powers of attorney, malpractice issues, asset protection, and state and federal estate taxes. From meeting with clients and determining goals to developing trusts and protecting business interests, the authors detail the step-by-step process of creating an effective and customized client strategy. These top lawyers also discuss new trends in trusts, how to match the right trust to the right client, and tactics for contesting a trust or estate. Additionally, these leaders analyze recent significant cases, the challenges of working with high net worth clients, and the impact of todays economy on the practice area. The different niches represented and the breadth of perspectives presented enable readers to get inside some of the great legal minds of today, as these skilled lawyers offer up their thoughts on the keys to success within this ever-evolving field.

A Guide to International Estate Planning Aspatore Books

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."

Strategies for Trusts and Estates in Florida, 2015 Ed McGraw Hill Professional

The popular handbook to estate planning, now updated for 2018 Since its first publication in 2002, New Rules for Estate, Retirement, and Tax Planning has sold more than 40,000 copies, providing a solid, accessible introduction to estate planning for any age or income bracket. Now in its sixth edition, Estate, Retirement, and Tax Planning continues this tradition, covering such topics as trusts, donations, life insurance, and wills in easy-to-understand language that offers valuable insights and solid strategies to help you preserve your wealth and plan your estate so that your assets go where you want with a minimum of taxes and government interference. This comprehensive guide answers such common questions as: How much do I need to retire comfortably? How do I protect my children's inheritance? How do I ensure planned donations are made after I'm gone? And many more. The Sixth Edition is also fully updated to reflect changes following the 2018 Tax Cuts and Jobs Act, so that you can learn how new regulations could impact your inheritance and trusts. Other notable features include advice on working with elderly parents and introducing financial planning to children and teenagers, in addition to a list of professional advisers and a glossary of estate planning terms. Understand estate planning and obtain solid strategies for growing your wealth Explore asset protection and succession planning strategies Discover how recent updates to the tax code could affect you and your heirs Stay informed of any relevant law changes with an author-managed web site Estate, Retirement, and Tax Planning contains a wealth of valuable information for any adult who needs help planning their financial future, from the established professional heading toward retirement, to the young adult looking to understand the basics. Wherever you are in your journey, use Estate, Retirement, and Tax Planning to ensure your legacy is protected.

Strategies for Trusts and Estates in Florida Aspatore Books

Elder Law Trusts and Estates is an authoritative, insider's perspective on best practices for working with clients and their families during the estate planning process. Featuring partners and chairs from law firms around the nation, these experts guide the reader step-by-step through the estate planning process when working with elderly clients and offer advice on overcoming common challenges in asset protection by ensuring appropriate documentation, managing timing, and avoiding tax problems. These top lawyers discuss the importance of understanding the client's goals by obtaining key information, developing a good attorney-client relationship, and managing interactions with family members who may be involved in the estate planning process. Additionally, these leaders outline important jurisdictional considerations and offer their thoughts on recent regulatory developments and trends that will have an impact on estate planning. The different niches represented and the breadth of perspectives presented enable readers to get inside some of the great legal minds of today, as these experienced lawyers offer up their thoughts around the keys to navigating an ever-evolving area of law. Book jacket.

Leading Lawyers on Navigating the Estate Planning Process, Counseling Clients, and Responding to the Latest Trends and Challenges John Wiley & Sons

Strategies for Trusts and Estates in Florida is an authoritative, insiders perspective on best practices for handling the estate planning process in the state of Florida. Featuring partners and shareholders from some of the states leading law firms, these experts guide the reader through the process of gathering important information from the client, including the clients family situation, ownership of assets, business and professional interests, and inheritance rights. From keeping up to date on relevant decisions in the area of estate planning to understanding the common issues and concerns that face Florida residents, these authors emphasize what is needed to determine the best estate planning strategy for your client. Additionally, these leaders offer advice on the common mistakes and pitfalls in this practice area and emphasize the consequences of a poorly drafted trust. The different niches represented and the breadth of perspective presented enable readers to get inside some of the great legal minds of today, as these experienced lawyers offer up their thoughts around the keys to navigating this ever-evolving area of law.

Leading Lawyers on Drafting a Flexible Plan, Protecting the Client's Assets, and Leveraging Tax Strategies Aspatore Books

The only book of its kind, explaining the unique features of personal property trusts and how they can be used for privacy, asset protection, negotiations, estate planning and more. From corporation and LLC records to vehicle and boat registrations, the personal property trust can allow you to keep your name off the public records, pass property without probate, manage your IRA or Roth IRA, and deal with those who might not have your best interests at heart. The book explains in simple language the 16 benefits of using personal property trusts, and how to prepare and use them in everyday transactions. It includes 31 ready-to-use legal forms and also some sample forms to guide you in completing them.

International Estate Planning Strategies Aspatore Books

Strategies for Trusts and Estates in Florida provides an authoritative, insiders perspective on key strategies for aiding clients in Florida on developing flexible estate plans. Featuring partners from some of the nations leading law firms, these experts guide the reader through the process of getting to know the client and gathering the necessary information before outlining a plan. These top lawyers offer their advice for conducting preliminary interviews, reviewing existing documents, drafting new documents, and creating various trusts. From changing tax laws to second marriage issues, these authors discuss the steps for identifying and overcoming challenges in the estate planning process. Additional topics include the importance of educating the client and staying up-to-date on changes in the trusts and estates arena. The different niches represented and the breadth of perspectives presented enable readers to get inside some of the great legal minds of today, as these experienced lawyers offer up their thoughts around the keys to success within this ever-evolving field.

Wills, Trusts & Estates Aspatore Books

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

The Ultimate Guide to Estate Planning in Louisiana Aspatore Books

The information Louisiana families need to protect the people they love and the assets they've earned. This book reveals the most common estate planning mistakes wealthy families make and how to avoid them. Also includes powerful estate planning strategies to protect your family. Includes information on wills, living trusts, planning for special needs children, incapacity planning, powers of attorney, living wills and health care directives.