Price On Contemporary Estate Planning 2015

FRENCH SHEPARD

Techniques for Protecting Yourself and Your Family
LexisNexis
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.
The Women's Estate Planning Guide Aspen Publishers
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.

1996 Supplement Vandeplas Pub.

CCH's U.S. Master Estate and Gift Tax Guide is a concise and reliable handbook for both tax advisors and estate representatives involved in federal estate and gift tax planning, return preparation and tax payment. This trusted reference provides clear explanations of the laws relating to federal estate, gift and generation-skipping transfer taxes to give readers the solid understanding they need to understand and apply today's complex wealth transfer tax rules. The U.S. Master Estate and Gift Tax Guide provides straightforward guidance for professionals working with estate and gift tax planning.

Everyone's Guide to Estate Planning Aspen Publishers

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

Fiduciary Duties and Liabilities CCH

This edition is 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 and Donaldson show how to handle the full range of estate planning problems and techniques.

Price on Contemporary Estate Planning Aspen Publishers

This book is the most current and comprehensive single volume resource in estate planning. It combines comprehensive analysis of legal and tax considerations involved in estate planning with a practice-oriented approach. This cumulative supplement to the Second Edition includes a detailed discussion about FLPs, LLCs, Section 2036 and the Courts.

Price on Contemporary Estate Planning John Wiley & Sons

The third edition of Contemporary Trusts and Estates captures the rapid evolution of doctrine in trusts and estates law that has occurred over the past half-century in response to profound societal and demographic changes. Based on recent developments in legal education, this casebook integrates legal analysis, judgment and perspective, ethics, and practice skills. It focuses simultaneously on the theoretical foundations and practical applications of the material, teaching students by using traditional case analysis and, at the professor’s option, innovative exercises. Features: Newly designed, with Wills now presented before Trusts New problems, exercises and cases ¿ Post-Obergefell v. Hodges developments for same-sex families More material on decanting and the new Uniform Trust Decanting Act Inclusion of the Uniform Powers of Appointment Act Discussion of planning for digital assets Incorporation of 2016 ACTEC Commentary on the Model Rules

U. S. Master Estate and Gift Tax Guide (2016) Cch

The world has gone digital and so have our clients’ estates. Digital assets may simply be electronic records, but they are the digital gateway to our lives. They are our memories, our money, and our records, making technology the new player at the estate planning table. The Digital Executor®: Unraveling the New Path for Estate Planning arms estate advisors, business owners, service providers, and the broader estate and technology industries with heightened awareness of client expectations regarding their digital estates. Everyone needs a will and in today’s age of digitization, estate plans must include your client's digital life. This book is a primer for understanding a client’s personal use case when navigating estate management in the digital age with introductions to technology and the underlying aspects and differences between digital asset classes. With technology being the new player at the client’s estate planning table, estate advisors must be educated, motivated, and prepared, adapting policies and processes for operating in the digital world. Equally, technology and service providers must align with the stars to be integrated partners in estate industry conversations. Sharon’s first book, Your Digital Undertaker: Exploring Death in the Digital Age in Canada, was about digital assets in the context of an individual’s or client’s estate planning life cycle. This follow-up book, Digital Executor®: Unraveling the New Path for Estate Planning is about digital assets in the context of the estate industry. This book draws the reader into the world of estate planning with a digital twist, bringing together how the global estate industry, technology and service providers must address client expectations about their digital assets and the implications of the changing role of the fiduciary/executor. To understand the role of digital assets in the estate industry, we must first understand technology, the client’s user context, and the changing role of the estate advisor. From an estate industry perspective, if today’s executor is a digital executor and today’s fiduciary is a digital fiduciary, then today’s advisor must be a digital advisor.

Contemporary Estate Planning FriesenPress

ABOUT PRICE ON CONTEMPORARY ESTATE PLANNING: This edition is 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 and Donaldson show how to handle the full range of estate planning problems and techniques, including: - Client counseling - Durable powers of attorney - Living wills - Private annuities - Charitable remainder trusts - Life insurance - Lifetime noncharitable gifts - Closely held business interests - Community

and marital property - Retirement plans and IRAs - Post-mortem planning - Professional responsibility, and more! Helpful practice tools include numerous real-life examples illustrating application of principles, ready-to-adapt forms, and checklists.
Digital Executor® Wolters Kluwer
This casebook is designed to present in a comprehensive yet streamlined fashion the law of Wills, Trusts, and Future Interests to 21st-century law students. It assists the student in developing an understanding of the core legal concepts critical to a grasp of wills, trusts and future interests in a novel format that is clear and easy to understand, while maintaining the intellectual rigor of the subject. The book covers the standard topics, but is organized in an innovative fashion. It begins with an estate planning problem which introduces the student to the craft of the practitioner, providing context for the introduction of substantive law. It then presents the law of wills law by reference to the law governing the testator, the document and the property. Attention is given to non-probate transfers, and in particular, the law of trusts, private and charitable. A model trust instrument is also provided. It concludes with a comprehensive look at future interests and the rule against perpetuities. As with other books in the Interactive Casebook Series, it challenges students to think about issues raised by the cases as they are considered in the opinion through the use of text boxes. The accompanying electronic version allows students immediate access to the full text of cited cases, statutes, articles, and other relevant materials.
The Tools and Techniques of Estate Planning, 20th Edition McGraw Hill Professional
The CCH Financial and Estate Planning Guide is the premier guidebook for professionals who structure, tailor and administer financial and estate plans. In the clearest of language, the guide explains all the important planning concepts, and examines the most important techniques used to set and meet the financial goals of clients and their families.
Tax and Trust Accountant's Guide Aspen Publishers
CCH's U.S. Master Estate and Gift Tax Guide is a concise and reliable handbook for both tax advisors and estate representatives involved in federal estate and gift tax planning, return preparation and tax payment. This trusted reference provides clear explanations of the laws relating to federal estate, gift and generation-skipping transfer (GST) taxes to give readers the solid understanding they need to apply today's complex wealth transfer tax rules.
A Contemporary Approach CCH
Price on Contemporary Estate Planning (2022)
Research, Planning and Strategies Cengage Learning
Succeed in your course and your paralegal career with WILLS, TRUSTS, AND ESTATE ADMINISTRATION, 8th Edition. This easy-to-understand text introduces the basics of estate planning and bequeathing property to others through wills and trusts, along with the laws and procedures involved, including the Uniform Probate Code. Packed with engaging, highly visual content enhanced by detailed exhibits and a writing style free of confusing legalese, the 8th Edition provides up-to-date coverage of relevant laws, court procedures, cases, tax implications, ethical considerations, and the roles paralegals and other professionals play in the process. Throughout the text, user-friendly case summaries, state-specific examples, practical assignments, detailed documents, and real-life contemporary issues prepare you for success as a paralegal in this important area of law. Important Notice: Media content referenced within the product description or the product text may not be available in the ebook version.
Price on Contemporary Estate Planning (2019) Wolters Kluwer
ABOUT PRICE ON CONTEMPORARY ESTATE PLANNING:This edition is 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 and Donaldson show how to handle the full range of estate planning problems and techniques, including:
Wills, Trusts, and Estate Administration CCH
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.
Loring and Rounds CCH
This textbook for students of estate planning covers the subject in a client-oriented approach from initial client interview to post-mortem planning. Professional responsibility, ethics, and potential malpractice issues are stressed throughout the book.
Price on Contemporary Estate Planning Wolters Kluwer
U.S. Master Estate and Gift Tax Guide is a practical guide for both tax advisors and estate planning professionals involved in federal estate and gift tax planning, return preparation and tax payment. The 2018 Edition of this comprehensive reference provides clear explanations of the laws relating to federal estate, gift and generation-skipping transfer taxes to give readers the solid understanding they need to apply today's complex rules. This resource contains many helpful Features, including: Concise, up-to-date discussions of recent statutory and regulatory law changes, court decisions, and IRS rulings affecting the estate, gift and generation-skipping transfer taxes. Pertinent tax tables, such as the unified credit and exclusion / exemption amounts, GST rates and more for easy reference to key tax figures. Citations to the Internal Revenue Code, regulations, IRS rulings and court decisions to help practitioners further research the estate and gift tax law. Access the Latest Tax Law Developments, A special webpage created by Wolters Kluwer for the U.S. Master Estate and Gift Tax Guide will keep you up-to-date with late-breaking tax legislative developments occurring after publication of the 2018 Edition. Visit CCHGroup.com/TaxUpdatesto find the legislative information you'll need to keep U.S. Master Estate and Gift Tax Guide your first source for practical tax guidance. Leading Estate Planning Information and Tools for Professionals Wolters Kluwer offers a suite of products providing in-depth analysis, guidance and solutions in a full range of options-from guides, practice manuals and treatises to newsletters, Internet research libraries and planning software. Make Wolters Kluwer your source for guidance with comprehensive, time-saving estate planning products for professionals, including: Federal Estate & Gift Taxes: Code & Regulations, Practical Guide to Estate Planning, Price on Contemporary Estate Planning, Financial and Estate Planning Library, CCH® Estate Planning Expert Library CCH® FinEst Calcs Book jacket.
Contemporary Estate Planning in an Uncertain World McGraw-Hill/Contemporary
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.
Estate Planning Cch
Loring and Rounds: A Trustee's Handbook is an invaluable practical resource that addresses the rights, duties, and obligations of the parties once the trustee takes title to trust

property. This Handbook steers you through this complex field, providing property owners with a mechanism for seeing to the needs of beneficiaries in cost-effective, creative, efficient, and flexible ways. Loring and Rounds: A Trustee's Handbook is a handy, ready reference, and a gateway to the treatises, restatements, law review articles, uniform statutes, and cases you need to know. This fully integrated and bound volume of the 2021 Handbook brings you up to date on the latest cases, statutes, and developments, as well as new or updated discussion of topics as follow: The Handbook continues the lengthy process of pruning some of the deadwood; significant exposition has been cut, revised, or combined. In sum, the Handbook is now even leaner, meaner, and more usable than ever. In addition, numerous new cases and secondary sources have been added. These include the following: The 2021 Handbook fully covers the fourth income and principal act issued by the Uniform Law Commission, namely the Uniform Fiduciary Income and Principal Act (2018), otherwise known as UFIPA. UFIPA has been covered extensively in this edition and has been added in many separate sections. A new section covers remedies at law for breaches of trust, such as the tort of intentional interference with inheritance or acquisition by inter vivos transfer. In addition, the Handbook has been updated with 200+ new cases, including: Roth v. Jelley, holding that, when it comes to a judicial proceeding that could adversely affect the equitable property rights of a trust beneficiary,the beneficiary is entitled under the Due Process Clause of the Fourteenth Amendment to notice and an opportunity to be heard. This case also discusses the various consequences attendant to the failure to provide such notice. Hector v. Bank of N.Y. Mellon, where the court, having in part looked to the Restatement (Third) for guidance, held that the designated passive corporate trustee of a securitized fund of mortgage-backed notes would not be personally at fault, and therefore, not personally liable for any injuries to the tenants of a certain parcel of real estate, title to which the trustee had acquired via foreclosure, that might be occasioned by their exposure to lead paint in and about the premises. Murphy v. Trustee of Star Financial Bank, a case discussing the unfortunate linkage of survivorship and per stirpes: "to their surviving children per stirpes." The court held that the way in which "surviving" and "per stirpes" were linked rendered the provision itself ambiguous in that the "condition of survival negates the right of representation inherent in a per stirpes distribution." 2020 Tax Rates for Trusts and 2021 Projected Tax Rate Schedule for Trusts Note: Online subscriptions are for three-month periods. Previous Edition: Loring and Rounds: A Trustee's Handbook, 2020 Edition, ISBN 9781543818666

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