



Tools & Techniques Estate Planning (Tools & Techniques)

Leimberg, Polacek, Rosenbloom, Miller, Kandell

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Discover one of the industry's oldest, most trusted sources for a working knowledge of estate planning guiding through the entire process: in-depth explanations, point-by-point comparisons, tax implications, and the translation skills needed to help clients understand complex recommendations. Delivers comprehensive coverage of more than 50 tools and techniques with supporting overview of taxes affecting trusts/estates and countless estate planning aids with new data gathering forms.

Are you avoiding the 10 most common estate planning mistakes? Discover one of the industry's oldest, most trusted sources for a working knowledge of estate planning guiding you through the entire estate planning process with: in-depth explanations, point-by-point comparisons, tax implications, and the translation skills needed to help clients understand complex recommendations. Delivers comprehensive coverage of more than 50 estate planning tools and techniques with supporting overview of taxes affecting trusts and estates and countless estate planning aids with new data gathering forms.

Chapters hone skills/strategies towards:

Identifying estate planning, data gathering & analysis processes

Defining ownership & transfer of property

Discussing general taxation as it impacts estate planning

Planning for non-U.S. persons & post mortem elections

Assessing gifts with analysis of various trusts & giving to charities

Reviewing the role of life insurance

Intrafamily & other business transfer techniques

Planning for incapacity & non-traditional relationships

14th Edition is supplemented to capture all of the opportunities related to the Pension Protection Act of 2006 featuring a quick reference guide from the Editors of Tax Facts Series (\$15.20 value). New chapters deliver expanded coverage on family limited partnerships with new checklists and factors determining proper gift(sale) leaseback transaction treatment. Kiddie tax, Medicaid, and Deferred Compensation under new IRC Section 409A changes enrich the relevancy of this text. Discover clear and concise explanations easily translated into the real-world planning process involving the accumulation, conservation, and distribution of an estate. Life Insurance, PACE, and CFP® CE Filed.

Chapters to feature: the top 12

Ownership and Transfer of Property

Power of Appointment

Marital Deduction and Bypass Trusts

Irrevocable Life Insurance Trust

Family Limited Partnerships

Grantor Retained Interest Trusts

Defective Trust

Estate Tax

Sale (Gift) Leaseback

Valuation Planning

Disclaimers

Gift Tax

Delivers value at any knowledge level introductory, overview & review!

Testimonials

In each of our books we had one major goal in mind: To create the single best source of up-to-date, pragmatic and transferable information on the topics you need to help others.

Stephan R. Leimberg, Lead Author of Tools & Techniques

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Sam Grimes:

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Michael Palmateer:

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