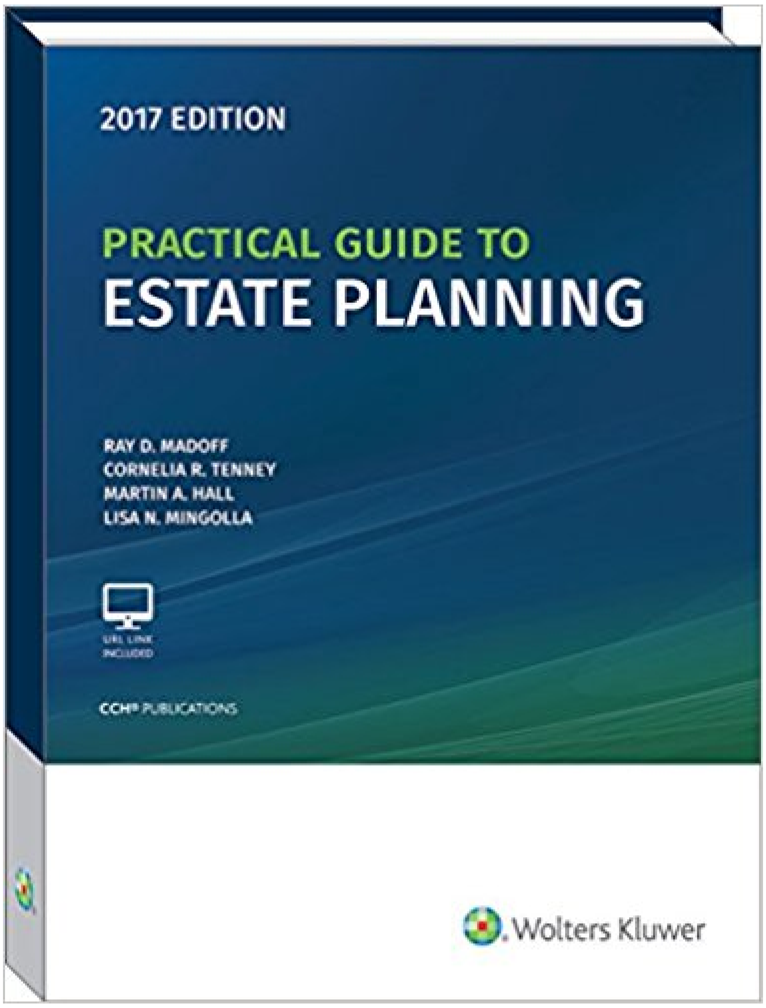
Practical Guide To Estate Planning 2017



Synopsis

Practical Guide to Estate Planning provides an overview of estate planning, offering the widest discussion on planning principles and tools from the simple to the sophisticated. This book is not lacking in detail, as witnessed by its well-annotated collection of forms that will appeal to many experienced estate planners. The layout of this book reflects its emphasis on simplicity and clarity. Its scope includes a general overview of the estate planning process. It then addresses the rules involved in estate planning and the various ways in which estates may be structured to achieve desired tax effects. It goes on to discuss gifts, and some of the more specialized areas of estate planning, including generation-skipping transfer tax rules and charitable planning, which encompass the use of private foundations and split-interest trusts. Finally, Practical Guide to Estate Planning contains a set of estate planning forms. Included are a living trust, an irrevocable life insurance trust, an annual exclusion trust, a pour-over will, a will with outright dispositions, a codicil, a living will, a charitable remainder unitrust, a durable power of attorney, a health care proxy, a qualified personal residence trust (QPRT) and a Grantor Retained Annuity Trust (GRAT). The authors provide alternative drafting options as well as comprehensive annotations that can be used as quick references that explain why and how these devices operate.

Book Information

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Customer Reviews

Ray D. Madoff is a Professor at Boston College Law School specializing in the areas of trusts and estates and estate planning. Prior to entering teaching, Professor Madoff practiced law in New York and Boston. She received her B.A. with honors from Brown University and her J.D. and LL.M. in

Taxation from New York University School of Law. Professor Madoff has been a frequent lecturer on issues of tax and estate planning and she is the author of numerous publications. Professor Madoff is an Academic Fellow of the American College of Trust and Estate Counsel and a member of the American Law Institute. Cornelia R. Tenney is an attorney in the estate planning and nonprofit groups at Hemenway and Barnes in Boston, Massachusetts. She received a B.A. with honors and an M.L.S. from the University of Wisconsin-Madison, an M.A. from the University of Pennsylvania, a J.D. magna cum laude from Harvard Law School, and an LL.M. in Taxation from Boston University. She served as a clerk to Justice Ruth Abrams at the Massachusetts Supreme Judicial Court. Her practice is focused on sophisticated estate planning, planning for business interests, and charitable organizations, and she has written and lectured frequently on these topics. Martin A. Hall has been with the law firm of Ropes & Gray, in Boston, Massachusetts, since 1986 and has been a partner since 1994. He is the current chair of the firm's Private Client Group. Martin graduated with an M.A. in law, first class honors (1981) from Cambridge University, England and earned a J.D., summa cum laude (1986) from Boston University School of Law. Martin is co-author with Carolyn M. Osteen, also of Ropes & Gray, of the Harvard Manual on Tax Aspects of Charitable Giving (8th ed. 1999). Martin is a Fellow of the American College of Trust and Estate Counsel, and has served as Chair of the Estate and Gift Tax Committee of the Tax Section of the American Bar Association. Lisa Nalchajian Mingolla is a partner in the Trusts and Estates and Tax Departments at Sullivan & Worcester LLP In Boston, Massachusetts. Ms. Mingolla received her B.S.E., magna cum laude, from Princeton University, her J.D. from Boston College Law School, and her LL.M. in Taxation from Boston University School of Law. She is a member of the Trusts and Estates Section and Estate Planning Committee of the Boston Bar Association.

Well written, organized and very useful.

After buying numerous books on estate planning, I will never give this one up. It is a plain language guide to the major areas of estate planning, with each section written by an expert in the field. The book also contains examples of documents that can be easily adapted for each client's particular needs. I love this book! Every estate planner should have it, and anyone with questions about basic estate planning techniques could benefit from reading it. It's pricey, but worth it.

As the owner of two privately held corporations, and with a strong interest in estate planning, I found this to be the best and most comprehensive guide that I have encountered. It's much more in-depth than the many over-simplified popular guides to financial planning, and yet it's still accessible to the layman. Few people will read it cover to cover, but selective browsing reveals some excellent strategies and untangles a number of complex ideas. The writing is clear and accessible. I'll take a copy to my next meeting with my attorney. One small critique: I could have benefitted from some more graphic presentations of the information.

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