

Understanding Living Trusts: How You Can Avoid Probate, Keep Control, Save Taxes, And Enjoy Peace Of Mind

Praise for Henry W. Abts III's Previous Book: "Unquestionably the layman's most nearly complete source on living trusts. . . . Recommended reading for anyone who wants to maximize his net estate left to heirs, speed asset distribution after death, avoid will challenges, minimize estate costs, and maintain privacy." -- Robert Bruss, Esq. Nationally Syndicated Real Estate Columnist Chicago Tribune "Presents in clear, concise, and readable language what every person needs to know. I heartily recommend it as required reading for every caring husband, wife, parent--all those with an estate to pass along to heirs." -- Byron Countryman, Esq. Countryman and McDaniel Attorneys at Law, Los Angeles From bestselling author Henry W. Abts III comes this comprehensive guide to protecting your estate for your heirs. How to Settle Your Living Trust provides you with everything you need to know to distribute Trust assets, understand the legal and financial aspects of Trusts, properly handle asset valuation, get protection in special circumstances, avoid unnecessary taxes and legal fees, and more. Samples and explanations of all the necessary documents--durable power of attorney for health care or general asset competency clause, living will, etc.--are included, as are the "key" rules and methods for organizing all financial information. Sample (filled-in) IRS tax forms are included to show the reader how to satisfy the IRS Trust settlement requirements. A must-have guide and reference, this book brings you peace of mind if you are interested in ensuring that your estate is passed on promptly and correctly. How to Settle Your Living Trust offers pertinent advice for surviving family members, as well as attorneys and accountants. It includes: Up-to-date information on recent tax changes affecting estate settlement In-depth discussion of the Roth IRA as an estate planning tool Estate settlement techniques for all estates, whether small, average, or large Estate settlement differences in separate property states and community property states Sound advice for surviving spouse and family members Special section on advanced settlement options for highly valued estates How to Settle Your Living Trust provides guidance in avoiding tax traps and other estate settlement pitfalls. Did you know that: Up to 75 percent of your traditional IRA can be consumed by taxes if you die before all the funds are depleted? Distributions from a traditional IRA must begin at age 70½? Estate settlement differs in separate property states and community property states? Allocation of Trust assets to the A, B, and/or C sub-trusts is critical when the first spouse dies? Most attorneys and accountants do not know how to properly settle an estate in a Living Trust? Special techniques are available that allow full stepped-up valuation on all Trust assets, even in separate property states? A nationally recognized authority on Living Trusts, Henry W. Abts III is chairman and founder of The Estate Plan, the nation's oldest and largest Living Trust production corporation, responsible for creating more than 25,000 Living Trusts. A graduate of the University of Southern California, Abts holds a master's degree from the Stanford University Graduate School of Business.

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.

From the duo behind the massively successful and award-winning podcast Stuff You Should Know comes an unexpected look at things you thought you knew. Josh Clark and Chuck Bryant started the podcast Stuff You Should Know back in 2008 because they were curious!Curious about the world around them, curious about what they might have missed in their formal educations, and curious to dig deeper on stuff they thought they understood. As it turns out, they aren't the only curious ones. They've since amassed a rabid fan base, making Stuff You Should Know one of the most popular podcasts in the world. Armed with their inquisitive natures and a passion for sharing, they uncover the weird, fascinating, delightful, or unexpected elements of a wide variety of topics. The pair have now taken their near-boundless "whys" and "hows" from your earbuds to the pages of a book for the first time!featuring a completely new array of subjects that they've long wondered about and wanted to explore. Each chapter is further embellished with snappy visual material to allow for rabbit-hole tangents and digressions!including charts, illustrations, sidebars, and footnotes. Follow along as the two dig into the underlying stories of everything from the origin of Murphy beds, to the history of facial hair, to the psychology of being lost. Have you ever wondered about the world around you, and wished to see the magic in everyday things? Come get curious with Stuff You Should Know. With Josh and Chuck as your guide, there's something interesting about everything (...except maybe jackhammers).

A revocable living trust is a type of trust created for the purpose of holding ownership of an individual's assets during that person's lifetime, and for distributing those assets after their death. This particular type of trust can be an excellent tool for solving a number of issues confronting individuals and families today, including the avoidance of probate, the management of property during periods of incapacity, the protection of property for beneficiaries who can't manage an inheritance on their own, protecting assets from disgruntled heirs, the elimination or minimization of federal estate taxes, and the assurance that personal affairs will remain private. This self-help legal book provides you with step-by-step instructions, detailed information and all the legal forms necessary to enable you to establish your own revocable living trust. □ Avoid Probate. □ Manage Your Property During Incapacity. □ Make Gifts to Your Loved Ones. □ Create Trusts for Young Beneficiaries.

The Complete Book of Wills, Estates & Trusts

Estate Planning For Dummies

Living Trusts for Everyone

The Christian Guide to Wills, Living Trusts and Estate Planning #1

An Incomplete Compendium of Mostly Interesting Things

Suze Orman's Protection Portfolio

A Step-by-Step Plan to Protect Your Assets, Limit Your Taxes, and Ensure Your Wishes Are Fulfilled

A comprehensive guide to living trusts, with expert financial and legal guidance The Living Trust Advisor is an expert guide for both advisors and their clients on the complex process of establishing, living with, and maintaining a living trust. Written by renowned family inheritance attorney Jeffrey L.

Condon, this book discusses the various aspects of this important document, and shows you how to manage a seamless transfer of assets to various beneficiaries. This new second edition has been fully updated and revised to reflect the extensive changes to the Estate Tax Law that have taken place since the initial publication, giving you the most up-to-date information and guidance on preserving your wealth and helping your heirs avoid estate tax liability. You'll develop a vision for your trust before you ever meet with an attorney or other key players, and learn how to establish and maintain a trust that remains rock-solid for your lifetime and beyond. As the living trust has replaced the will as the primary means of settling after-death estates, clear guidance and current legal information is of utmost importance for advisors and clients alike. This book is a valuable resource for every stage of planning and execution, helping you ensure that you provide for your beneficiaries the way you intend. Know what to think about before your first meeting with a lawyer Establish and manage your living trust to carry out your wishes Identify potential inheritance problems and build solutions into the trust Distribute assets to future generations, and protect them after the transfer Dealing with complex financial and legal issues while facing our own mortality is a difficult task, but making these decisions is critical to the future outcome of your estate. The Living Trust Advisor expertly guides you through the process so you can be confident that your wishes will be carried out.

Navigate probate, tax issues, and state laws Create an estate plan and protect your family's interests Need a will, but have no idea where to start? This friendly guide shows youhow to prepare a legal will or trust — either on your own or with professional help — and ensure that your wishes are honored.

You'll handle everything from planning your bequests and writing and signing a will to selecting a trust and drafting your durable power of attorney. Discover how to: Provide for your children Hire and work with professionals Minimize tax liabilities Amend or revoke a will or trust Avoid common estate planning mistakes Note: CD-ROM/DVD and other supplementary materials are not included as part of eBook file.

The best legal guide to wills and estates—with more than 80,000 copies sold—now updated to cover the current asset protection options and estate laws Whether grappling with modest or extensive assets, The Complete Book of Wills, Estates, and Trusts has long been the indispensable guide for protecting an estate for loved ones. In this completely revised third edition, updated to cover the latest changes in estate law, attorney Alexander A. Bove, Jr., clearly explains • how to use a will to avoid probate and legal complications • how trusts work and how to use trusts to save taxes • how to contest a will and how to avoid a contest • how to settle an estate or make a claim against one • how to establish a durable power of attorney • how to protect assets from creditors In his straightforward and humorous style, Bove shares easy-to-understand legal definitions, savvy advice on taxes, and pragmatic and simple sample forms, all illustrated with entertaining examples and actual cases. The Complete Book of Wills, Estates, and Trusts is the best guide available for defending your financial legacy

This practice-oriented forms book contains everything necessary to understand, present & implement a living revocable or irrevocable trust. 1 Volume; Looseleaf; updated with annual revision.

Legal Self-Help Guide

Forms and Practice

A Step-by-Step Guide to Making a Living Trust....

Estate Planning in Louisiana

Make Your Own Living Trust

The Right Way and Wrong Way of Leaving Money to Your Children (and Others)

The Complete Book of Trusts

The classic legal guide to wills, estates, and trusts—with more than 100,000 copies in print—now substantially updated and revised! Whether grappling with modest or extensive assets, The Complete Book of Wills, Estates, & Trusts has long been the indispensable guide for protecting this completely revised fourth edition, updated to cover the latest changes in estate law, attorney Alexander A. Bove, Jr. synthesizes his decades of field and classroom experience into honest, clear, and entertaining explanations of a host of complex legal topics, including: • how to use a will to avoid probate and legal complications • how trusts work and how to use trusts to save taxes • how to contest a will and how to avoid a contest • how to settle an estate or make a claim against one • how to establish a durable power of attorney • how to straightforward and humorous style, Bove shares easy-to-understand legal definitions, savvy advice on taxes, and pragmatic and simple sample forms, all illustrated with entertaining examples and actual cases. This is the only legal guide readers will ever need to ensure that the the family.

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 (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 this title feature links to Lexis Advance for further legal research options.

A guide to estate planning discusses such topics as wills, the probate process, selecting an executor, living trusts, naming a guardian for young children, living wills, and setting up a power of attorney.

If you're like most people, you want to be sure that, once you've passed on, no more of your property and money will be lost to the government than is absolutely necessary. You want to know that you'll be leaving your heirs your assets and not your debts. You want to be able to shape, your insurance policies are structured properly, and that every conceivable hole in your estate plan has been filled. And most of all, you'd like to do all of this without driving yourself crazy trying to make sense of the complicated jargon, jumble of paperwork, and welter of acronyms in the estate planning process. Written by two estate planning pros, this simple, easy-to-use guide takes the pain out of planning for your ultimate financial future. In plain English, the authors walk you step-by-step through everything you need to know to: Put your estate into proper will Deal with probate Set up trusts Make sure your insurance policies are structured properly Plan for special situations, like becoming incompetent and pet care Craft a solid estate plan and keep it up-to-date Don't leave the final disposition of your estate up to chance Estate Planning For Dummies gives you the complete lowdown on: Figuring out what you're really worth Mastering the basics of wills and probate Using will substitutes and dodging probate taxes Setting up protective trusts, charitable trusts, living trusts and more Making sense of taxes Avoiding the generation skipping transfer tax Minimizing all your estate-related taxes Estate planning for family businesses Creating a comprehensive estate plan Straightforward, reader-friendly, easy-to-use, Estate Planning For Dummies is the ultimate guide to planning your estate.

AARP Crash Course in Estate Planning

Make Your Own Revocable Living Trust in Minutes, Without a Lawyer....

Wills & Trusts Kit For Dummies

Understanding Living Trusts®

How to Settle Your Living Trust

J.K. Lasser's New Rules for Estate and Tax Planning

A Do-It-Yourself Plan for Creating a Will and Living Trust

A new, updated edition of the ultimate guide to trusts Trusts are powerful and flexible financial planning tools, and this new edition of The Complete Book of Trusts covers everything you need to know to protect your hard-earned assets from taxes, creditors, and more. This updated Third Edition provides all the latest information on trusts, addressing recent changes due to economic growth and the Tax Relief Reconciliation Act of 2001 in such areas as transferring assets, distribution of income, gift and estate tax rules, and many others. Along with in-depth examinations of sixty different types of trusts, this book also shows you how to: Set up a trust to manage assets in the event of disability or death Avoid probate Minimize or eliminate estate and other transfer taxes Financially protect loved ones And more The Complete Book of Trusts, Third Edition is an invaluable resource for anyone with significant assets to protect.

One of the fastest ways to transfer property after your death is through a living trust because trusts are not required to go through probate court. In addition to saving time and avoiding probate costs, a trust lets you control who will receive property after you die. "8 Living Trust Forms" helps you create your own living trust forms to meet your needs. You'll discover how to: avoid probate, distribute property quickly, keep property distributions private, provide an alternative to creating a will, ensure your possessions will be distributed as you wish, reduce the potential family conflicts, and much more. For many people, a will is their first choice for passing on property to their loved ones, but it's not the only document that should be considered. Both a will and living trust contain your inheritance instructions, meaning they state who gets what property, when they will get it, and how they will get it. To create a living trust, a lawyer is not required or necessary, especially for simple living trusts. All you really need is a little bit of intelligence and the right information. A living trust can be an important part--and in some cases, the most important part--of your estate. A living trust can help ensure that your assets are managed according to your wishes, even if you become unable to manage the trusts yourself. Sample Living Trust Forms Include: Single Person Living Trust Married Living Trust Married AB Living Trust Florida Witness Statement for Living Trust Assignment of Property to a Living Trust Affidavit of Assumption of Duties by Successor Trustee Living Trust Amendment Revocation of Living Trust Checklist The Legal Self-Help Guide series provides information to those who want to understand their legal rights and responsibilities in an effort to resolve legal problems or know enough to feel confident in their decision to retain legal counsel. This Guide provides plain-English explanations as an alternative to the legal jargon that fills legal books. Express Your Rights. At Peerless Legal we believe the law is only useful when people have the tools they need to understand their rights. Join us on our quest to make the law usable and accessible to anyone. No CDs No Confusing Online Application Forms No Monthly (Or Hourly) Fees Save Time Save Money Make It Legal Learn Basics Learn more and get updates at www.PeerlessLegal.com.

Written in clear, conversational English, this book can help anyone understand how a living trust avoids the complications, expenses, and delays of probate at times of incapacity and death.

Discusses estate planning and how to provide for the family fairly and equitably, facilitate charitable giving, and avoid probate

Eitinger on Elder Law Estate Planning

The Living Trust

The American Bar Association Guide to Wills & Estates

The Complete Book of Wills, Estates & Trusts (4th Edition)

The Complete Guide to Creating Your Own Living Trust

How to Avoid Probate, Save Taxes and Enjoy Peace of Mind

Clever Girl Finance

Take charge of your finances and achieve financial independence – the Clever Girl way Join the ranks of thousands of smart and savvy women who have turned to money expert and author Bola Sokunbi for guidance on ditching debt, saving money, and building real wealth. Sokunbi, the force behind the hugely popular Clever Girl Finance website, draws on her personal money mistakes and financial redemption to educate and empower a new generation of women on their journey to financial freedom. Lighthearted and accessible, Clever Girl Finance encourages women to talk about money and financial wellness and shows them how to navigate their own murky financial waters and come out afloat on the other side. Monitor your expenses, build a budget, and stick with it Make the most of a modest salary and still have money to spare Keep your credit in check and clean up credit card chaos Start and succeed at your side hustle Build a nest egg and invest in your future Transform your money mindset and be accountable for your financial well-being Feel the power of real-world stories from other "clever girls" Put yourself on the path to financial success with the valuable lessons learned from Clever Girl Finance.

Enjoy peace of mind knowing that your assets will pass to your family according to your wishes Regardless of your age or income, writing a legal will is one of the greatest gifts you can give your family. But where do you begin? Wills & Trusts Kit For Dummies walks you through the most important considerations to have in mind when you're deciding what will happen to your estate when you're gone. Writing a will or setting up a trust isn't as fun as binge watching the latest hot web series, but this book makes the task a little less daunting. Find out who needs a will or trust (spoiler alert: everyone!), when you should create one, and how to take the first steps. Handy online content includes practical worksheets, forms, and templates that simplify and explain the process of estate planning in language that doesn't require a legal education to understand. With the help of Wills & Trusts Kit For Dummies, you'll have a document that details your final wishes before you know it. Navigate probate, tax, and state laws that govern how property is passed to the next generation Avoid the most common estate planning pitfalls and mistakes Choose qualified professionals and specialists to help you make the best decisions for your family Designate a guardian for your children and plan for their financial needs You deserve to know that your loved ones will be properly taken care of when you're no longer with them. Wills & Trusts Kit For Dummies delivers straightforward guidance and peace of mind on a subject that, sooner or later, we all must face.

The Complete Cardinal Guide to Planning For and Living in Retirement offers comprehensive coverage of everything you need to know to begin strategizing for your retirement years. With clear and simple language, Hans Scheil who has 40 years of experience providing long-term care insurance and financial planning explains the details of Social Security and Medicare, long-term care insurance, asset management, taxes, and how to find qualified advisors. These explanations are illustrated by real-world examples drawn from Han Scheil's own practice."

A comprehensive guide to estate and charitable planning and how to incorporate the Christian worldview. The objective is to help you understand why Christian estate planning is unique and to help you accomplish all God has for you in that process. Learn how to find an estate planning attorney, whether or not you need a living trust, and how to provide for your loved ones and organizations important to you as part of your personal legacy.

A Doctor's Guide to Personal Finance and Investing

The White Coat Investor

How You Can Avoid Probate, Save Taxes and Enjoy Peace of Mind

The Complete Living Trusts Program

Beyond the Grave

A Layman's Guide to Understanding Wills, Trusts, Probate, Power of Attorney, Medicaid, Living Wills and Taxes

Everything You (and Your Financial Planner) Need to Know about Your Living Trust

*WE THE PEOPLE No lawyers. Save money. We The People is America's largest legal document services company. Dedicated to helping every American avoid the high cost of legal fees, We The People gives you the information you need to handle your own legal filings quickly, easily, and inexpensively. Hundreds of thousands of Americans have already liberated themselves from the tyranny of attorneys' fees--and now you can too! We The People's Guide to Estate Planning makes planning for your future as painless as possible--all without the added hassle of hiring a lawyer. This practical, nuts-and-bolts guide covers all the basics of do-it-yourself estate planning, and covers everything you need to know about living trusts, wills, probate, and estate taxes. Extra resources--a glossary of estate planning terminology; a section on frequently asked questions; samples of effective living trusts and a last will and testament; as well as worksheets and essential information on how to settle an estate--make this the best resource available for this important step in planning for the future. You'll have all the information you need to understand the legal language of a will or living trust and learn how to seek state-specific laws and customs so you can tailor your plans accordingly. In addition, you can download sample documents from which you can create your own. Inside, you'll learn all the basics and more: * Whether you need a living trust, a will, or both * Creating a valid last will and testament * Designating a successor trustee or executor to an estate * Deciding who gets what--and making sure they do * Setting up a living trust and funding it with assets * Understanding durable power of attorney documents and living wills * Tax-saving tips that help you leave more for your beneficiaries * Getting to know (in plain English) the legal language of your will or living trust * Where to download sample documents * Settling an estate with or without a valid will or living trust It's important to take care of the ones you love after you're gone. But if your estate planning isn't done clearly, precisely, and legally, you could end up creating more problems for your survivors than you solve. Do it right, do it inexpensively, and do it yourself--with We The People's Guide to Estate Planning.*

Explains the advantages and disadvantages of a living trust as well as how it works

One of the most critical decisions a person must make when crafting a will or establishing a trust is whom to name as executor or trustee. Being chosen for these important jobs is an honor, and you must know how to perform the tasks correctly. With the help of this new book, The Complete Guide to Trust and Estate Management, you will understand the complex process of carrying out a person's final wishes. This book will provide insight whether you are a lawyer, accountant, financial consultant, spouse, adult child, relative, or friend; the simple, easy to understand language makes this book accessible to everyone. You will become familiar with many estate and trust management terms, such as beneficiary, probate, remaindermen, trust agreement, trust property, trustor, and trustee. In addition, you will learn the many duties and responsibilities of an executor, including the disbursement of property to the beneficiaries, collecting and arranging for the payment of debts, approving and disproving creditors claims, calculating taxes, filing forms, assisting the estate attorney, acting as the representative of the estate, inventorying and appraising the assets, and acting in the best interests of the deceased. After reading this book, you will know how to initiate probate; how to preserve the value of the estate; how to notify beneficiaries; how to send notices to the post office, banks, utilities, and credit card companies; how to file for Social Security, civil service, and veteran benefits; how to file tax returns; and how to file state death and federal estate tax returns. As executor, you will be responsible for settling the deceased person's estate and as trustee, you will be responsible for holding and administering the trust assets in the best interests of the trust's beneficiaries. Using this book as a guide, you can be assured that you will be prepared to properly perform the necessary duties entrusted to you. Atlantic Publishing is a small, independent publishing company based in Ocala, Florida. Founded over twenty years ago in the company president's garage, Atlantic Publishing has grown to become a renowned resource for non-fiction books. Today, over 450 titles are in print covering subjects such as small business, healthy living, management, finance, careers, and real estate. Atlantic Publishing prides itself on producing award winning, high-quality manuals that give readers up-to-date, pertinent information, real-world examples, and case studies with expert advice. Every book has resources, contact information, and web sites of the products or companies discussed.

"You've worked hard building your estate - whether large or small. Louisiana's estate planning laws are different from all other states' laws. This book will teach you what you need to know to protect your estate for yourself and your loved ones" -- back cover.

How You Can Settle a Living Trust Swiftly, Easily, and Safely

Build Your Own Living Revocable Trust

We The People's Guide to Estate Planning

Stuff You Should Know

Why You Should Avoid Living Trusts

How You Can Avoid Probate, Keep Control, Save Taxes, and Enjoy Peace of Mind

Ditch debt, save money and build real wealth

"Elder Law Estate Planning" is a niche area of law which combines the features of elder law and estate planning that pertain most to the needs of the middle class. In 1991, AARP published a "Consumer Report on Probate" concluding that probate was a process to be avoided. That marked the end of traditional will planning and started the "living trust revolution." Since then, millions of people have set up trusts to: * Save time and money in settling the estate * Avoid legal guardianship if they become disabled * Avoid having their personal and financial matters made public * Reduce the chance of a "will contest" * Keep control in the family and out of the court system By 1990, the field of elder law also emerged to help people navigate the increased complexity of state Medicaid rules and regulations, the soaring costs of nursing home stays, and the fact that people were living considerably longer. Elder law and estate planning continue to grow independently of each other, sometimes to the detriment of clients. Estate planning lawyers are of little value when the estate plan to avoid probate fails to prevent a nursing home stay consuming all of the assets, because the lawyer is unfamiliar with elder law. On the other hand, elder law attorneys often protect assets but overlook basic estate planning issues such as saving taxes and keeping assets in the blood. The practice of Elder Law Estate Planning means: * Getting your assets to your heirs, in the best possible way, with least amount of taxes and legal fees * Keeping those assets in the blood for your grandchildren, and * Protecting your assets from the costs of long-term care and qualifying for government benefits available to pay for care. Middle class clients today need an "elder law estate planning attorney" to address their estate planning needs as well as to help with long-term care, disability and Medicaid issues as they arise.

Written by a practicing emergency physician, The White Coat Investor is a high-yield manual that specifically deals with the financial issues facing medical students, residents, physicians, dentists, and similar high-income professionals. Doctors are highly-educated and extensively trained at making difficult diagnoses and performing life saving procedures. However, they receive little to no training in business, personal finance, investing, insurance, taxes, estate planning, and asset protection. This book fills in the gaps and will teach you to use your high income to escape from your student loans, provide for your family, build wealth, and stop getting ripped off by unscrupulous financial professionals. Straight talk and clear explanations allow the book to be easily digested by a novice to the subject matter yet the book also contains advanced concepts specific to physicians you won't find in other financial books. This book will teach you how to: Graduate from medical school with as little debt as possible Escape from student loans within two to five years of residency graduation Purchase the right types and amounts of insurance Decide when to buy a house and how much to spend on it Learn to invest in a sensible, low-cost and effective manner with or without the assistance of an advisor Avoid investments which are designed to be sold, not bought Select advisors who give great service and advice at a fair price Become a millionaire within five to ten years of residency graduation Use a "Backdoor Roth IRA" and "Stealth IRA" to boost your retirement funds and decrease your taxes Protect your hard-won assets from professional and personal lawsuits Avoid estate taxes, avoid probate, and ensure your children and your money go where you want when you die Minimize your tax burden, keeping more of your hard-earned money Decide between an employee job and an independent contractor job Choose between sole proprietorship, Limited Liability Company, S Corporation, and C Corporation Take a look at the first pages of the book by clicking on the Look Inside feature Praise For The White Coat Investor "Much of my financial planning practice is helping doctors to correct mistakes that reading this book would have avoided in the first place." - Allan S. Roth, MBA, CPA, CFP(R), Author of How a Second Grader Beats Wall Street "Jim Dahle has done a lot of thinking about the peculiar financial problems facing physicians, and you, lucky reader, are about to reap the bounty of both his experience and his research." - William J. Bernstein, MD, Author of The Investor's Manifesto and seven other investing books "This book should be in every career counselor's office and delivered with every medical degree." - Rick Van Ness, Author of Common Sense Investing "The White Coat Investor provides an expert consult for your finances. I now feel confident I can be a millionaire at 40 without feeling like a jerk." - Joe Jones, DO "Jim Dahle has done for physician financial illiteracy what penicillin did for neurosyphilis." - Dennis Bethel, MD "An excellent practical personal finance guide for physicians in training and in practice from a non biased source we can actually trust." - Greg E Wilde, M.D Scroll up, click the buy button, and get started today! Updated 7th edition for 2016. Hailed as America's best book on living trusts, it has been a favorite of consumers and professionals for more than 25 years. In clear, conversational English, the author explains problems with having a will, joint ownership and beneficiary designations...and the many benefits of a living trust.

Living trusts simplified! Protect your family and avoid probate with this bestselling guide Death may be inevitable, but probate doesn't have to be. By creating a living trust, your property will bypass lengthy and expensive probate proceedings and go directly to the people you've designated, quickly and easily. Make Your Own Living Trust explains how to create a living trust, transfer property to the trust, and amend or revoke the trust at any time. Use this book to: decide whether a living trust is right for your family create a probate-avoiding trust or an estate-tax-saving AB trust name beneficiaries to inherit your assets appoint someone to manage trust property inherited by children keep control over trust property while you live appoint someone to manage trust property if needed understand how to transfer all types of assets to your trust, including real estate, stocks, jewelry, art or business assets Make Your Own Living Trust includes all the forms you need to create your own trust, plus step-by-step instructions for filling them out. Completely updated and revised, this edition includes the latest tax and legal information, including updated information about the federal estate tax. Good in all states except Louisiana.

8 Living Trust Forms

Living Trust, Living Hell

The Complete Guide to Trust and Estate Management

Asset Protection in Florida

The Real Truth about Living Trusts

Understanding Living Trusts

Make Your Own Living Trust & Avoid Probate

A complete guide to planning an estate under today's taxrules When it comes to your estate--no matter how big or small it maybe--you shouldn't leave anything to chance. Proper planning isnecessary to protect both your assets and your heirs. EstatePlanning Law Specialist Harold Apolinsky and expert financialplanner Stewart Welch III know this better than anyone else, and inthe Revised and Updated Edition of J.K. Lasser's New Rules forEstate and Tax Planning, they offer valuable advice and solidstrategies to help you plan your estate under today's tax rules aswell as preserve your wealth. Packed with up-to-the-minute facts,this practical resource covers important issues, such as: * How new legislation will impact inheritances and trusts * Estate and generation-skipping tax planning * The role of wills, executors, and trusts * Treatment of charitable contributions * The do's and don'ts of gifting * Life insurance and retirement planning Filled with in-depth insights and expert advice, this book willshow you how to efficiently arrange your estate today so that youcan leave more to those you care about tomorrow.

Estate and Trust Administration For Dummies, 2nd Edition (9781119543879) was previously published as Estate and Trust Administration For Dummies, 2nd Edition (9781118412251). While this version features a new Dummies cover and design, the content is the same as the prior release and should not be considered a new or updated product. Your plain-English guide to administering an estate and/or trust As more and more of the population reach senior ages—including baby boomers, many of whom do not have wills—an increasing number of people are being thrust into the role of executor, administrator, personal representative of an estate, or trustee of a trust after the death of a loved one. This updated edition of Estate & Trust Administration For Dummies guides you through the confusing process of administering an estate and/or trust. Settling an estate and administering a trust can be complicated, messy, and time-consuming for individuals named as executor or trustee, most of whom have no previous experience with such matters. Estate & Trust Administration For Dummies shows you how to make sound decisions for your unique circumstances. Guides you through the confusing process of administering an estate and/or trust Provides expert advice on unfamiliar estate and trust tax law Gives you a practical checklist to follow for all of your estate and trust administration questions and concerns Whether you're looking for guidance on how to navigate the probate process and estate taxes, settle debts and bequests, fund a trust, comply with tax regulations, or anything in between, this hands-on, friendly guide takes away the mystery and provides detailed answers to all of your estate and trust administration questions.

If you want to protect your assets and make sure they are distributed according to your wishes, think about establishing a living trust. It can be designed to manage your investments now and provide broader financial management later to make provisions for a surviving spouse, children, or others, and reduce the impact of estate taxes or avoid probate. This book explains the complicated issues, terminology, and planning strategies of living trusts to the layperson. When you meet with a qualified attorney you will be well prepared, versed in the language, and ready to discuss issues and strategies, which saves time, legal fees, and ensures peace of mind. Get started today!

Suze Orman's Financial Package is a systematic approach for organising your essential documents. The Financial Package is very different from any other product of this type, because Suze has included three CDs that actually include the forms and instructions to create your own advanced directive with durable power of attorney for health care, financial power of attorney, will, and a trust.

Estate & Trust Administration For Dummies

The Living Trust Advisor

The Essential Guide to Wills, Trusts, and Your Personal Legacy

The Forms You Need Today to Protect Your Tomorrows

Wills and Trusts Kit For Dummies

The Complete Cardinal Guide to Planning for and Living in Retirement

Living Trusts

"... is unquestionably the layman's most nearly complete source on living trusts. . . . Recommended reading for anyone who wants to maximize his net estate left to heirs, speed asset distribution after death, avoid will challenges, minimize Robert Bruss, Esq., and Nationally Syndicated Real Estate Columnist Chicago Tribune ". . . presents in clear, concise, and readable language what every person needs to know. I heartily recommend it as required reading for every caring husband whose estate to pass along to heirs." -- Byron Countryman, Esq. Countryman and McDaniel Attorneys at Law, Los Angeles Why The Living Trust Is So Important You may think your heirs have been well provided for, but did you know that: Your loved ones may not receive a penny from your estate--even though you have left a legally valid will? Costs of probating your will may eat up more than 10 percent of your estate--money your heirs will never receive? The specific instructions of your will may be completely--even though clearly spelled out in your will? Once a will is probated, it becomes a matter of public record--anyone can access the information just by going to the courthouse and asking for your file? A will cannot help you in life. If your judgment comes into question, it becomes a matter for the courts to decide and is, again, a very public process. A Living Trust is a simple, inexpensive legal alternative that eliminates the costs and delays of probate and ensures that your loved ones receive their inheritance promptly and exactly as you intended. It is also the only estate planning tool that allows you to plan for your own incapacity or for avoiding competency hearings. When The Living Trust was published in 1989, it quickly became the bible on estate planning. It includes information on the new IRA Q-TIP Trust, the Spousal and Family Support Trust, and the Family Limited Partnership. In addition, there is new material on the Charitable Remainder Trust (to preserve a large estate), the Gift Trust (to protect for the handicapped, and a checklist of more than 150 "must" provisions that separate a good Living Trust from a bad one. Also included is up-to-date information about trusts for unmarried couples, placing assets in your trust, and much, much more. A nationally recognized authority on Living Trusts, Henry W. Abts III is chairman and founder of The Estate Plan, the nation's oldest and largest Living Trust production corporation, responsible for creating more than 2 million Living Trusts. University of Southern California, Abts holds a master's degree from the Stanford University Graduate School of Business.

Living Revocable Trust: What You Need to Know to Create One Today!? Why wait when it can be done now? Free yourself of future problems with your Will by building your very own Living Revocable Trust. You do not have to be a millionaire to have a Living Revocable Trust. If you want to protect your assets, you want to protect his or her assets should have a Trust. This eBook is here to help you out.This eBook - "Building your Own Living Revocable Trust: A Pocket Guide to Creating a Living Revocable Trust"- was created by author Patrick X. Gallagher. It is an inexpensive way of creating your very own Trust. The author provides a personal narrative of his experience in creating his own living revocable trust. He turns this narrative into a self-help instructional and in-depth discussion of how you can protect your assets while you are still able to do so, then do it now. Create your living revocable trust and you will eliminate the hassle of going to a probate court in the future. Sure you can create your Will to protect your assets and manage your estate after you have died, your family needs to prove in a probate court that the Will is valid. With a Living Revocable Trust, you can save your family from the pain and financial stress of a probate hearing.This new living trust eBook guarantees a clear path to success. You can set up your Trust down the steps you will undertake in order to write and complete your very own trust. In addition to these steps, the author also includes in his Living Revocable Trust eBook some of the document samples.He guarantees that you will save money on your Trust that you will normally have to pay a lawyer to make.Patrick X. Gallagher wants to share his experience and know-how on building a living revocable trust to those who would like to know which assets should be included and excluded from the Trust. You can empower themselves with the benefits of a creating a living revocable trust will benefit from buying this eBook. Moreover, those who are self-directed will reap the advantages of having this eBook in their hands. You can learn from someone who has experienced creating a Trust all by himself and someone who just want things done thoroughly yet inexpensively. Why keep a Trust for your Assets? Why Not Settle for a Will?Apart from the reasons extensively explained in the eBook, a Living Revocable Trust is a document that can be revoked, changed, or terminated at any time that the Trustee (the creator of the Trust) wishes to do so. In this way, your assets become more fluid. Also, the assets are kept protected as the Trust can be updated v. a Will, a Trust is more flexible and sustainable. A complete analysis and comparison between a Trust and a Will is presented in this eBook.While you are still around to protect your assets, why not start building your own Living Revocable Trust to avoid the consequences of a probate.Get Started with Building a Living Revocable Trust.Protect your assets by creating a document that privately assures the security of your assets that you want to pass down to your family and relatives.Free your family from the stress of a probate hearing. This eBook is here to help you complete a living revocable trust easily minus the headache and cost of dealing with lawyers. Be your own financial guru and protect your family today.Wait no Longer - click the buy button now!

This guide explains the benefits of a living trust in simple, specific terms and shows how to set up a loved one's trust with no lawyers and no expense. Wills benefit lawyers. Trusts benefit clients. Too often lawyers sell wills to clients and then charge them for services to their clients' heirs. Ronald Farrington Sharp describes the best way to handle modern estate planning and details the many advantages trusts have over wills in not only eliminating probate but in also protecting your assets for the future. Probate services are not needed to do the clerical work in settling a trust after death. This updated edition includes new information on an array of subjects, including: Elimination of the federal estate tax for most estates due to increased exempt amounts. Elimination of the estate tax for most estates due to increased exempt amounts. Passwords, usernames, and websites Keeping trustees honest and the process of removing trustees for malfeasance Forms for simplifying the planning process Strategies to lower attorneys' fees With no legal jargon, just step-by-step instructions for Everyone takes the mystery out of the process of setting up a trust. "Sharp makes a reasoned and strong case for the use of trusts as a complete alternative for wills. For roughly the cost of a lunch, Living Trusts for Everyone can . . . answer all the thoughtful questions to ensure that his or her lawyer is doing all that s/he can to protect that person's assets. For that alone, it belongs on your reading list." —New York Journal of Books "If you want to know a good deal about estate planning, this is a hundred-page boring book to read, I highly, highly recommend getting this one. It's short, to-the-point, and very informative." —FreeMoneyFinance.com "Ronald Sharp explains trusts in clear and easy-to-understand language, including one trust that is often better than a will and less costly!" —Lonnie McLane, Estate & Tax Consultants, LLC

* Avoid probate * Manage and protect assets through disability * Eliminate the need for a court-appointed guardian * Avoid living trusts hype AVOID THE BALONEY, PUFFERY, AND SNAKE OIL OR HOW TO BEST UTILIZE LIVING TRUSTS FOR YOUR OWN BENEFIT HEIRS A properly arranged living trust can be an invaluable estate and financial planning tool that ultimately insures your assets will reach heirs as quickly and cost effectively as possible. Unfortunately, this is more difficult to accomplish than you think. The surrounding living trusts is staggering. Many trusts are poorly written, shamefully mismanaged, and improperly used. But even when correctly planned, a living trust is not necessary or beneficial for everyone. How do you decide if it's the right choice for you? Get informed. In this comprehensive book, attorney Martin M. Sherkman guides you through the confusion to gain an understanding of the process that will help you avoid pitfalls, taxes, liability manipulation, and wasted money. Here you will learn how to: Minimize living trust abuse * Protect yourself from the legal and financial ravages of disability * Distinguish the hucksters from the real expert advisers * Use a living trust as part of a complete estate plan to reach all your personal goals * Avoid probate * Save taxes * Decipher documents . . . and much more. Using sample checklists, and numerous real-life examples, Sherkman provides a balanced view of living trusts that will clarify what you do and don't need.

Why a Will Is Not the Way to Avoid Probate, Protect Heirs, and Settle Estates

What You Need to Know about Being a Trustee Or an Executor Explained Simply

Advice That Can Save You Thousands of Dollars in Legal Fees and Taxes

Living Trust Kit

Advice that Can Save You Thousands of Dollars in Legal Fees and Taxes

A Guide to Creating a Living Revocable Trust

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

An expert in estate planning clears up common misconceptions about living trusts, in an easy-to-understand style. You will learn that all living trusts are not the same, and you will discover how to select the right kind of living trust for you and your family. You will understand the current estate tax laws, and how to use special tax planning trusts and a life insurance trust to save your family thousands of dollars in death taxes. The book alerts you to the severe and often surprising income tax burdens which your family may face when your IRA or Qualified Retirement Account is liquidated, and shows you how to minimize those problems. You will also learn about costly estate planning mistakes people commonly make, and how to avoid them!

A living trust is a trust used for the purpose of avoiding the delays and costs associated with probate. They are easy to set up and simply involve completing and signing a trust agreement in which you name yourself as both grantor (creator of the trust) and trustee (manager of the trust assets). Once set up, you transfer some or all your assets to the trust. As trustee, you then take over management of the trust assets. When you die, the assets are distributed to the beneficiaries named in the trust agreement. However, as the assets are held in the trust's name rather than in your personal name, they will not need to go through probate. This allows for the assets to be distributed quickly after your death, and without the probate fees. This self-help kit provides you with step-by-step instructions, detailed information and all the legal forms necessary to help you create your own revocable living trust and avoid probate. □ Prepare a living trust quickly and easily. □ Avoid the costs and delays of probate. □ Protect yourself and your assets during incapacity. □ Make gifts to your loved ones. □ Create trusts for young beneficiaries.

How to Avoid Probate, Save Taxes, and More : a Complete Information & Planning Guide Written in Easy to Understand, Conversational English