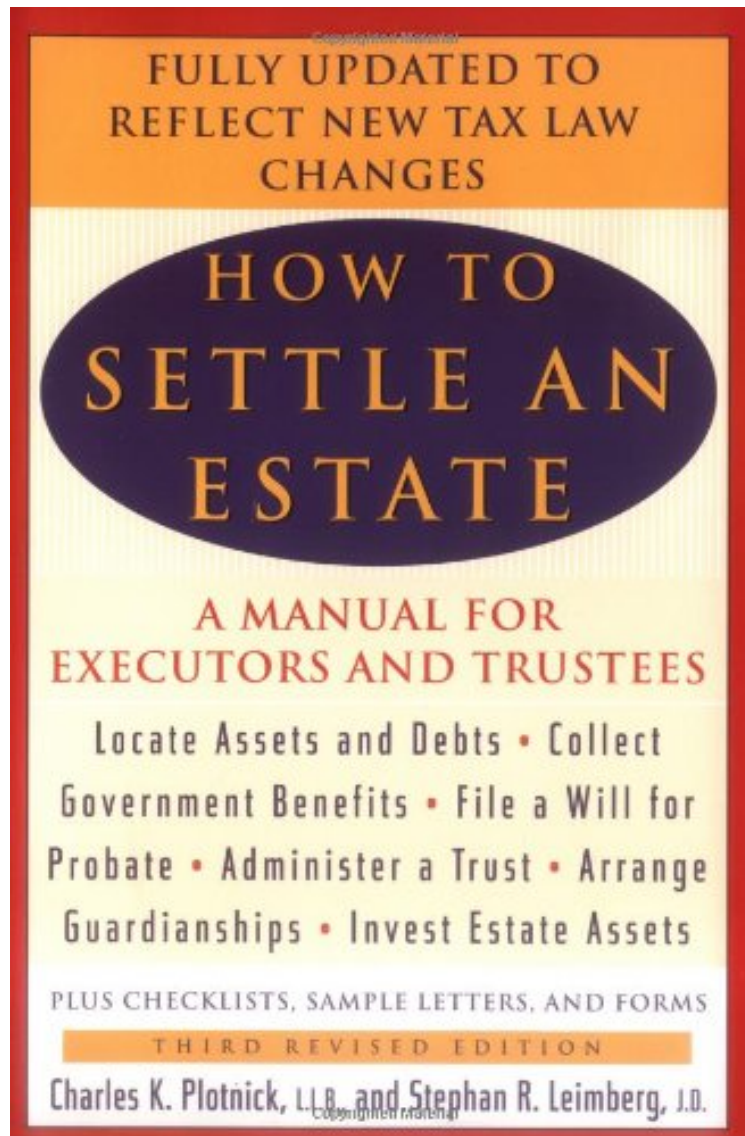


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How to Settle an Estate: A Manual for Executors and Trustees

Charles K. Plotnick, Stephen R. Leimberg
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64 of 65 people found the following review helpful. One Of The BestBy Michael MianoI have read six different books
concerning wills, probate, and trusts in the past few months. Of the books that I have read, this is clearly the best. All

of the standard stuff is here - except the constant reminders by the authors to hire an attorney. Unlike nearly all the other books, the authors do not talk-down to readers. The language was never too simple-minded and only in a few cases did I have to read a paragraph again to determine its meaning. The authors give hints and insights which I did not find in the other books. And the book contains the best explanation I have read concerning why trying to determine and report the lowest possible value of estate assets is not always the best idea. I do not plan to die for several years. If I could give to my future executor only one book, this would be it. I miss only estate/probate information about each state. Therefore, I am still confused about the interrelationship between state estate reporting and taxes and federal ones. Essentially, everything depends on the value of the taxable estate. If 20% of the readers of this book do so in anticipation of a death, my bet is that only 1% of those will have a taxable estate over \$1 million. And those people not having a million-dollar estate (after 2006) will not need to pay federal estate taxes - thereby eliminating the need for most of the book. First-time executors reading the book because of immediate need and suspecting a taxable estate value more than \$675,000 will be able to afford to hire a lawyer to do the (subjectively) most difficult parts of the job.

0 of 0 people found the following review helpful. (1) the deceased took the time to do the planning so that the estate was in good order to be settled. By D. Burton This book makes two fundamental assumptions: (1) the deceased took the time to do the planning so that the estate was in good order to be settled; and (2) there is a will, inventory of assets, etc. nicely left out by the deceased. None of this was true for me as the executor. The book is totally silent in response to the needs of a large group of people trying to deal with great complexity at a time when that is very difficult. If you have a large estate with many legal entities to understand and unravel, this book can be helpful. If not, save your money.

0 of 0 people found the following review helpful. Four Stars By Kayakbobwell written

The most complete and up-to-date estate-planning guide available Thoroughly revised and updated to reflect the latest tax codes, the third edition of *How to Settle an Estate* is the essential step-by-step guide to lead readers through the complex and daunting process of settling an estate. In clear and practical lay terms, authors Charles K. Plotnick, L.L.B., and Stephan R. Leimberg, J.D., both experts in estate planning, provide readers with invaluable advice, including: How to raise cash for immediate estate expenses Dealing with insurance claims Knowing when to hire a lawyer, an accountant, and a stock broker Managing real estate Distributing assets And much more...

From Library Journal The chance of being called on to act as executor for a deceased friend or relative is quite high. Intended for the nonlawyer, this book covers every facet of handling an estate, including organ donation, probate, insurance, government benefits, and taxes. Detailed checklists provide a step-by-step guide for the executor to follow in settling an estate. The guide also explains when and how to obtain expert legal and financial advice--and how to negotiate fees for these services. At all times, it emphasizes the importance of minimizing the risk of becoming personally liable for failure to act promptly and in the best interest of the estate and its beneficiaries. Very highly recommended. - Elizabeth Fielder Olson, Archer Greiner, Haddonfield, N.J. Copyright 1991 Reed Business Information, Inc. A clearly-written guide for someone who just found out that he or she is executor or trustee of an estate. Factors to consider, questions to ask and checklists to consult may all add up to the authors' laudable goal of less billable hours with your attorney. The Dallas Morning News Attorneys Plotnick and Leimberg have substantially updated their clear, comprehensive manual for executors and trustees of an estate... The new edition shines in its use of sample documents and checklists. It also addresses the psychological aspects of death and of being an executor An excellent and handy book. Library Journal About the Author Charles K. Plotnick, L.L.B., is an attorney in Pennsylvania and specializes in estate planning. He is professor of estate planning at Temple University in Philadelphia. Stephan R. Leimberg, J.D., is CEO of Leimberg Information Services, Inc., a provider of tax law commentary.