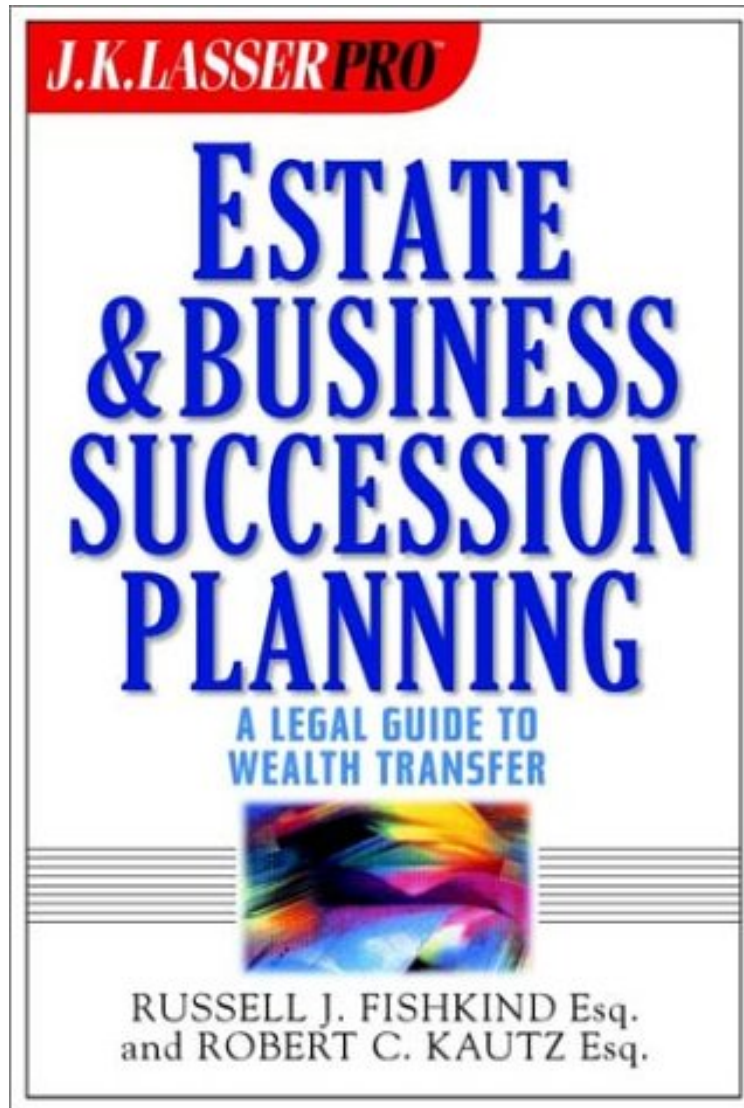


## J.K. Lasser Pro Estate Business Succession Planning: A Legal and Financial Guide

*Russell J. Fishkind, Robert C. Kautz*  
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**Russell J. Fishkind, Robert C. Kautz : J.K. Lasser Pro Estate Business Succession Planning: A Legal and Financial Guide** before purchasing it in order to gage whether or not it would be worth my time, and all praised J.K. Lasser Pro Estate Business Succession Planning: A Legal and Financial Guide:

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excellent introduction to the realm of estate planning. After reading this book, you should be able to comprehend what your Estate Lawyer or Planner is trying to communicate to you. It should also help you develop questions and strategies to present to your Lawyer or Planner. The book is well written and easy to comprehend without talking down to the layman and thorough in its scope. Some of the information needs an update as the tax laws concerning estates has changed, but the concepts are still relevant.

Written by two attorneys who specialize in estate planning, this book clarifies all the issues involved in planning an estate and transferring wealth. It offers comprehensive estate planning guidelines, including creating a will, designating power of attorney, trusts, and life insurance, and includes up-to-date estate and inheritance tax information.

From the Inside Flap Planning for the inevitability of death is always a difficult subject. Combine that with the complexities of the estate and gift tax systems under the new Economic Growth and Tax Relief Reconciliation Act of 2001 and its no wonder that people procrastinate when its time to create their estate plan. But Fishkind and Kautz have returned with an updated Second Edition of J.K. Lasser Pro Estate and Business Succession Planning to help answer all your questions. This Second Edition addresses all the changes both present and future associated with the Economic Growth and Tax Relief Reconciliation Act of 2001, and shows you how to take advantage of them. Fishkind and Kautz demystify the planning process and provide practical information that allows you to take action and save more when planning under the new tax law. J.K. Lasser Pro Estate and Business Succession Planning, Second Edition provides the inquiring individual, accountant, financial planner, insurance professional, student, banker, and attorney with a comprehensive overview of virtually every major planning technique. These techniques are then brought to life through real-world examples and interesting hypotheticals. Numerous estate and business succession planning techniques must often be integrated to meet an individuals needs. Accordingly, in the conclusion of this book, the authors show how to meld these techniques into an estate or business succession plan that is manageable and will reduce taxation. The authors provide a unique perspective on estate and succession planning. That is, most individuals spend a majority of their waking days developing a career and accumulating wealth. As one matures, priorities may shift into preserving that wealth. In order to complete this process, time and attention must be dedicated to transferring that wealth to the next generation in the most tax-efficient manner possible and in a way that promotes the well-being of loved ones. J.K. Lasser Pro Estate and Business Succession Planning, Second Edition guides you through this process by providing straightforward solutions to an often complicated issue.

From the Back Cover EFFECTIVE ESTATE AND BUSINESS SUCCESSION PLANNING UNDER THE NEW TAX LAW A properly designed and implemented estate and/or business succession plan is key to providing for and protecting loved ones in the most tax-efficient manner possible. A team of advisors must be assembled from the disciplines of law, insurance, finance, accounting, and tax in order to create a plan that optimizes planning opportunities incorporating both the current state of law with the current state of ones mind. J.K. Lasser Pro Estate and Business Succession Planning, Second Edition provides you with a unique and comprehensive analysis of the Economic Growth and Tax Relief Reconciliation Act of 2001, the new retirement distribution rules, Section 529 education plans, and split dollar insurance guidelines. It can help professionals and experienced individuals alike take advantage of opportunities presented by the new tax law, avoid common mistakes, and understand complex estate and business succession planning techniques. Written by two attorneys who specialize in estate planning matters, this easy-to-read book provides you with complete information and strategies for a variety of issues including: How to plan in light of the phased-in provisions of the Economic Growth and Tax Relief Reconciliation Act of 2001 Top twenty factors to consider when creating ones Will, as well as creating a Power of Attorney and Health Care Proxy Annual Exclusion and Exemption Equivalent Planning Irrevocable Life Insurance Trusts and Crummey Notices Charitable Remainder Trusts and Foundations Family Limited Partnerships Business Succession Planning Techniques Split Dollar Plans Section 529 education plans Retirement distribution rules Self-Canceling Installment Notes Intentionally Defective Grantor Trusts GRITs, GRATs, and GRUTs And this is just a sampling of the expertise that the authors provide in a truly unique and understandable text. J.K. Lasser Pro Estate and Business Succession Planning, Second Edition contains all you need to make the most of the new tax law while navigating this complex area, and shows you how to protect and provide for loved ones for generations to come. Please visit our Web site at [www.jklasser.com](http://www.jklasser.com)

About the Author RUSSELL J. FISHKIND is a Co-Chairman of the Trust and Estate Department with the law firm Wilentz, Goldman Spitzer. Mr. Fishkind concentrates his practice on high net worth estate planning, business succession planning, and probate litigation. He is also an Adjunct Associate Professor at New York University, Department of Finance, Taxation and Law, teaching estate planning; contributing author to the Institute of Continuing Legal Education s Sophisticated Estate Planning; and author of Legacy of a Lifetime, a layman s guide to estate planning. He is currently Co-Chairman of Endowments for the Greater Middlesex County Jewish Federation. ROBERT C. KAUTZ is a Partner with the law firm of Wilentz, Goldman Spitzer. Mr. Kautz chairs the Tax Department at Wilentz and concentrates his practice on estate planning and working with closely held businesses in designing strategies for business succession planning. Mr. Kautz is a contributing author to the Institute of Continuing Legal Education s Sophisticated Estate Planning. Formerly with the

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