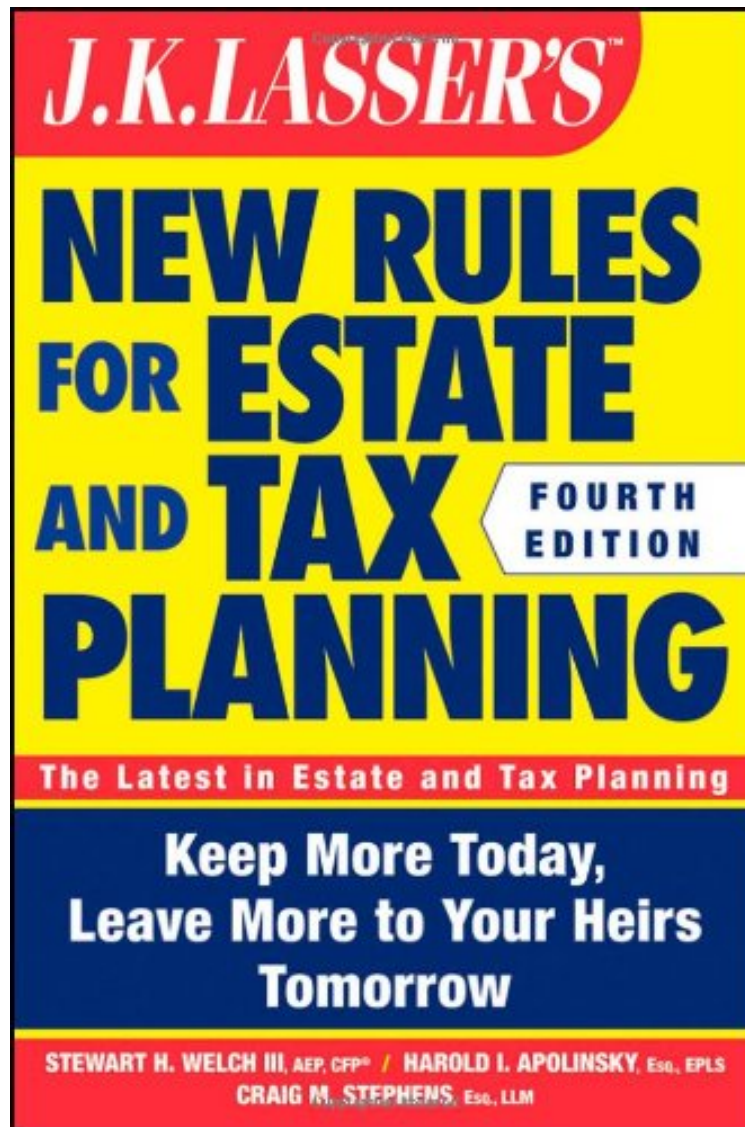


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## JK Lasser's New Rules for Estate and Tax Planning

*Stewart H. Welch III, Harold I. Apolinsky, Craig M. Stephens*

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**Stewart H. Welch III, Harold I. Apolinsky, Craig M. Stephens : JK Lasser's New Rules for Estate and Tax Planning** before purchasing it in order to gauge whether or not it would be worth my time, and all praised JK Lasser's New Rules for Estate and Tax Planning:

7 of 7 people found the following review helpful. Good Overview of Estate PlanningBy RussellBThis book provides a good overview of estate planning. I am an attorney who is going to be adding estate planning to my practice in the near future and this book has a lot of good information. Some people have complained that this book is too focused on using an attorney for estate planning. This is a strength and not a weakness. Estate planning is not something that a

person should try to do without an estate planning attorney. Tax law is too fluid and there are too many subtle nuances for the lay person to stay on top of changes in their state probate law and federal tax law. There are three really good reasons to have a professionally prepared estate plan: 1) minimize stress on your heirs after you pass; 2) ensure that you maximize the amount of your money that goes to your heirs and not Uncle Sam; and 3) ensure that your estate goes where you want it to go after you pass. This book will save you money. A client who comes into their attorney's office properly prepared, will require less of the attorney's time, and will therefore be billed less. Understanding the basic concepts of proper estate planning and properly organizing will minimize the amount of work necessary to prepare the estate plan and help you explain to your attorney what you want the goals of your estate plan to be. 9 of 9 people found the following review helpful. OUT OF DATE By Dr. GF This edition was published in 2012 and does not reflect the latest congressional action on the Estate Tax. As such it is not up to date and not the best guide to the future of estate planning. 0 of 0 people found the following review helpful. Five Stars By Customer excellent tax book

A complete guide to planning an estate under today's tax rules When it comes to an estate (no matter how big or small it may be) nothing should be left to chance. Proper planning is necessary to protect both your assets and your heirs. Estate Planning Law Specialists Harold Apolinsky and Craig Stephens and expert financial planner Stewart Welch III know this better than anyone else, and in the revised and updated edition of J.K. Lasser's *New Rules for Estate and Tax Planning*, they offer valuable advice and solid strategies to help you plan your estate under today's tax rules as well as preserve your wealth. Packed with up-to-the-minute facts, this practical resource covers a wealth of important issues. Reveals how new legislation will impact inheritances and trusts and offers guidance for estate and generation-skipping tax planning Explains the role of wills, executors, and trusts and shows how to treat charitable contributions Outlines the do's and don'ts of gifting and explains life insurance and retirement planning Filled with in-depth insights and expert advice, this book will show how to efficiently arrange your estate today so that you can leave more to those you care about tomorrow.

From the Back Cover A complete guide to planning an estate under today's tax rules Regardless of size, when it comes to planning an estate nothing should be left to chance. Proper planning is essential for protecting both your assets and your heirs. Estate Planning Law Specialists Harold Apolinsky and Craig Stephens and expert financial planner Stewart Welch III know this better than anyone else, and in the revised and updated Fourth Edition of J.K. Lasser's *New Rules for Estate and Tax Planning*, they offer valuable advice and solid strategies to help you plan your estate under today's ever-changing tax rules in order to preserve and maximize your wealth. Packed with up-to-the-minute facts and expert guidance, this practical and comprehensive resource: Reveals how new legislation will impact inheritances and trusts Offers guidance for estate and generation-skipping tax planning Explains the role of wills, executors, and trusts and shows how to treat charitable contributions Outlines the do's and don'ts of gifting and explains life insurance and retirement planning An authoritative guide to estate planning from some of the most recognized experts in the field, this new edition is fully updated to reflect recent changes in the law. Filled with in-depth insights and excellent advice, this book will show you how to efficiently arrange your estate today so that you can leave more to those you care about tomorrow. About the Author Stewart H. Welch III, AEP, CFP, is a nationally recognized financial advisor who is widely quoted in the press including *Money* magazine, the *Wall Street Journal*, *Worth*, and many other publications. He has served as Chair of the Disciplinary and Ethics Commission and as a member of the Board of Directors of the Certified Financial Planner Board of Standards, Inc. Mr. Welch's company, The Welch Group, is a fee-only money management and financial advisory firm in Birmingham, Alabama. Harold I. Apolinsky, Esq., EPLS, is a board-certified estate planning attorney with the law firm Sirote Permutt, PC in Birmingham, Alabama. He previously taught estate planning at the Cumberland School of Law and the University of Alabama Law School. Craig M. Stephens, Esq., LL.M., is co-chair of Sirote Permutt, PC's Estates, Wills, and Trusts practice group in Birmingham, Alabama. His practice focuses on representing individuals in the estate planning process, with a focus on tax-minimization strategies. He is an adjunct professor of estate planning and estate and gift taxation at the Cumberland School of Law.