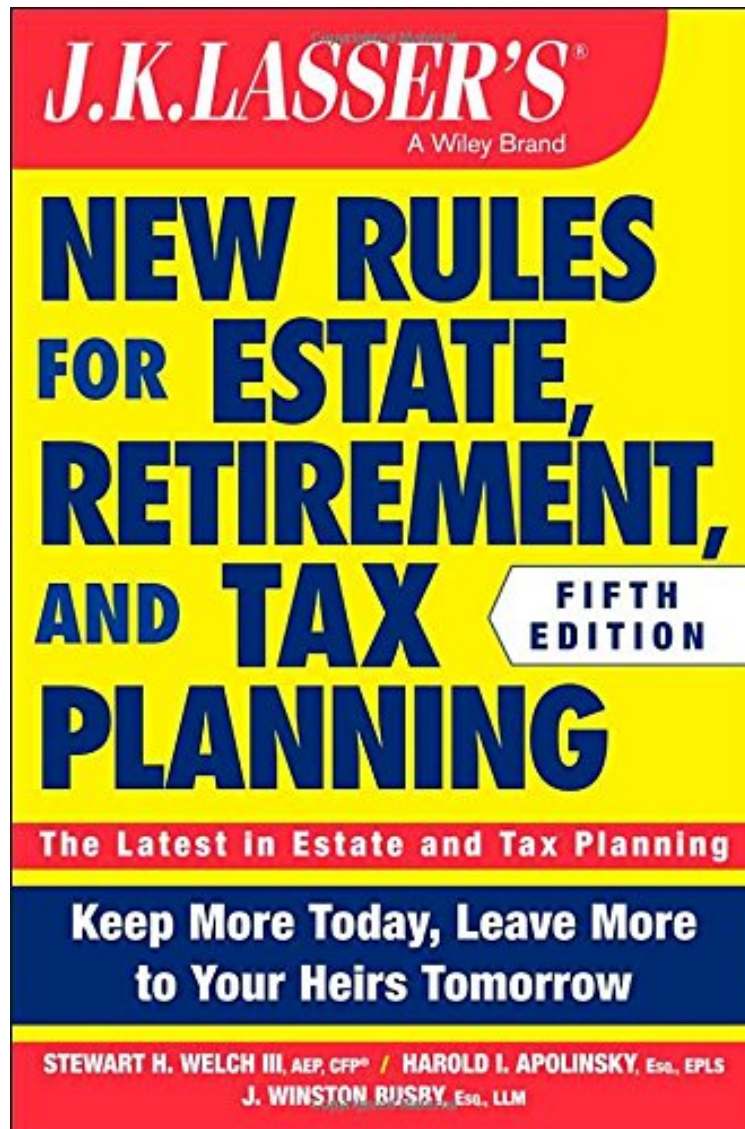


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JK Lasser's New Rules for Estate, Retirement, and Tax Planning

Stewart H. Welch III, Harold I. Apolinsky, J. Winston Busby

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Stewart H. Welch III, Harold I. Apolinsky, J. Winston Busby : JK Lasser's New Rules for Estate, Retirement, and Tax Planning before purchasing it in order to gage whether or not it would be worth my time, and all praised JK Lasser's New Rules for Estate, Retirement, and Tax Planning:

1 of 1 people found the following review helpful. This was the best book that I foundBy Margie M.Realized my estate planning had not been updated in quite some time and didn't want to incur the expense of a lawyer. This was the best book that I found. I was so surprised to find that one of the authors is a financial planner who writes a weekly article in my Sunday paper. The articles are so good. . .I frequently clip them to share with my grown children. The other author

was the attorney for my husband's CPA firm. I was not disappointed. The book is great and easy to read. It is well organized and easy to find the topic you are interested in. My children may get a copy for Christmas. It is very appropriate for adults of all ages. 1 of 1 people found the following review helpful. The client says " Show me that you know about Estate Planning because you said so, but because of your questions By Customer It's a super great book. Goes direct to the changes that took place in 2012 and goes in depth in specific chapter to each change. As a Life Insurance agent that is moving to talk to different kind of affluent clients with mixed needs, you are in good hands. You will look in the eyes of the client in a way that you are not just a sales man that only talks about whole life policies. You need this information to complement the spectrum of understanding about how the New rules for estate retirement and tax planning will affect every household in America. 1 of 1 people found the following review helpful. The best handbook for people approaching retirement By Interested father The best handbook for people approaching retirement. Up to date and guides you regarding what to expect and deadlines you must meet as you cross the finish line.

Current, relevant estate, retirement and tax planning strategies with expert insight and advice JK Lasser's New Rules for Estate, Retirement and Tax Planning is the authoritative guide to estate, retirement and tax planning, fully updated to reflect new changes and legal updates. Written by some of the most recognized experts in the field, this book offers useful planning advice for people of various ages and income levels, including information on retirement planning, trusts, charitable contributions, gifts, life insurance, and wills. In this guide, you'll find up-to-the-minute facts, valuable insight, and solid strategies to help you preserve your wealth and plan your estate under current tax rules. The helpful companion website provides spreadsheets, tools, and additional reading to help you get organized, while the book's expert guidance provides the background information you need to prepare properly. Estate planning is a complex topic, made even more complex by constantly changing laws. Failing to plan properly can result in your loved ones losing out on much of your hard-earned assets, and researching the topic on your own can be a minefield of assumptions, misunderstandings, and potential legal consequences. New Rules for Estate, Retirement and Tax Planning helps you sidestep the confusion, distilling the information down to what's relevant and current. This practical resource covers a wealth of important issues, including: Estate planning, taxation, and investing for maximum growth The role of wills, executors, and trusts, and how to treat charitable contributions Life insurance, retirement planning, Social Security claiming strategies and the do's and don'ts of gifting Business planning, including succession, asset protection, and family limited partnerships You've worked hard your entire life. You managed to accumulate assets. New Rules for Estate, Retirement and Tax Planning will help you maximize the transfer of your assets to the people and charities you love rather than the federal government in the form of taxes.

From the Back Cover Your hard-earned assets could disappear without proper planning You've worked hard your entire life and you've managed to accumulate assets. Don't let them go to taxes instead of the people and charities you love. This book helps you sidestep the minefield of confusion, assumptions, and misunderstanding to plan your financial future the way you want it, regardless of age or income level. You'll find up-to-the-minute facts, valuable insight, and solid strategies to help you preserve your wealth and plan your estate under current tax rules with information on retirement planning, trusts, charitable contributions, gifts, life insurance, and wills. Understand estate planning and learn solid strategies for growing your wealth Discover just how much money you'll need for retirement Learn how new legislation will impact inheritances and trusts Study the do's and don'ts of gifting assets to family Explore asset protection and succession planning strategies Stay informed of relevant law changes with our author-managed web site This authoritative guide helps you lock down your assets and provide for those you love, with clear guidance and expert advice. About the Author STEWART H. WELCH III, AEP, CFP, is a nationally recognized financial advisor who 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. 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. J. WINSTON BUSBY, ESQ, LL.M., is an attorney at Sirote Permutt, PC, focusing on tax and estate planning, income taxation of trusts and estates, succession planning, charitable giving techniques, and tax-exempt entities. J.K. Lasser Practical Guides for All Your Financial Needs Please visit our Web site at www.jklasser.com