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Titolo	Plan Your Own Estate : Passing on Your Assets and Your Values Legally and Efficiently // by Deirdre R. Wheatley-Liss
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ISBN	1-4302-4495-X
Edizione	[1st ed. 2013.]
Descrizione fisica	1 online resource (330 p.)
Disciplina	332.024016
Soggetti	Estate planning - United States Inheritance and transfer tax - Law and legislation - United States Business Management science
Lingua di pubblicazione	Inglese
Formato	Materiale a stampa
Livello bibliografico	Monografia
Note generali	"You can't take it with you, but make sure the right people get most of your stuff"--Cover. Includes index.
Nota di contenuto	Introduction -- What Are Your Goals? -- What Are Your Assets? -- What Goes into a Will? -- Will Alternatives and Avoiding Probate -- Trust in Trusts -- Rounding Out the Plan -- Taxes -- Gifting -- Insurance Trusts -- Advanced Tax Strategies -- Fiduciaries -- Planning Guide for Kids -- Planning Guide for Marrieds -- Planning Guide for Singles -- Planning Guide for Unmarried and Same-Sex Couples -- Planning Guide for Second Marriages -- Planning Guide for the Family Business -- Planning Guide for Noncitizens -- Planning Guide for Your Parents -- Planning Guide for Special-Needs Children -- Action Guide: Getting Started -- Action Guide: Completing Your Plan -- Action Guide: Reviewing What You Have -- Estate Analysis Checklist: Married -- Estate Analysis Checklist: Single -- Financial Worksheet: Married -- Financial Worksheet: Single -- Glossary -- Index.
Sommario/riassunto	Plan Your Own Estate: Passing on Your Assets and Your Values Legally and Efficiently takes a straightforward and engaging "you"-oriented approach to dealing with one of life's certainties--death. While you "can't take it with you," this book empowers you to decide how your assets can best help your family when you are gone. Experienced

attorney Deirdre R. Wheatley-Liss concentrates into this book the experience she's had helping hundreds of families work through their estate plans. Whether you have modest or extensive assets, Plan Your Own Estate provides the knowledge you need to design your plan and the tools you need to move forward. The starting place is your goals. Part 1 of the book asks, "What do you want to accomplish for yourself and your family?" The next step depends on you. Are you looking to educate yourself about how a will or trust is structured, or how tax law works? Part 2, Resource Guides, breaks down tough topics like these and delivers actionable information. Have questions about what your estate plan should say? Part 3, Planning Guides, goes through an attorney's analysis in considering the most frequently asked estate planning questions. Thinking about creating your own estate plan, or hiring an attorney? Part 4, Action Guides, helps you start your estate plan and make sure it's complete, or review any plan you may already have in place. Nobody likes talking about death, taxes, or disability--but not thinking about them will not make them go away. Plan Your Own Estate will help you make a plan, put it in place, and take control of how your money and your values are being passed to your family. This book includes: Comprehensive "plain English" coverage of every aspect of planning your estate Methods to protect your loved ones' inheritance from taxes, immaturity, lack of financial knowledge, incapacity, creditors, and predators Planning guides for families with children, singles, second marriages, business owners, unmarried or same-sex couples, and more Up-to-date information regarding changing laws and best practices.
