



J.K. Lasser ProEstate and Business Succession Planning: A Legal Guide to Wealth Transfer

Russell J. Fishkind, Robert C. Kautz

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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 one's 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 one's 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.

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