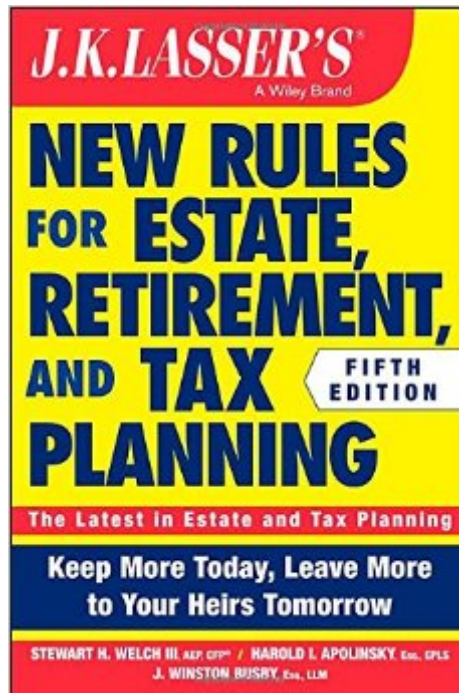


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# JK Lasser's New Rules For Estate, Retirement, And Tax Planning



## Synopsis

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.

## Book Information

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## Customer Reviews

This is one of the best estate planning books available. I highly recommend it. Be sure you are buying the 2014 edition and not the 2012 edition as the laws have changed significantly. It covers all subjects very well and even covers some advanced trusts used by estates subject to the federal estate tax. With this book and the Nolo books, you will have the subject covered very well.

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.

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.

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.

I have just started reading the book. It appears to be fairly comprehensive in coverage of several estate planning issues important to me.

Very helpful for estate planning final exam

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