

Asset Property Protection Estate Planning Both Before And

Designed for estate planning specialists and financial planners, International Estate Planning covers U.S. legal issues affecting estates, such as taxation, conflict of laws, community property and asset protection trusts. This eBook also provides analysis of selected countries chosen for their importance as potential sites for establishment of trusts or other investment vehicles (e.g., Bermuda and Liechtenstein), and as possible residences for U.S. nationals for business purposes. Each chapter is written by an expert in that country. Coverage includes:

- U.S. estate, gift and income taxation of nonresident aliens
- U.S. citizens with alien spouses - Qualified Domestic Trusts (QDOTs)
- U.S. income taxation of foreign trusts
- Separate chapters on U.S. tax treatment of foreign executives temporarily posted in the United States and of U.S. executives temporarily posted abroad
- Conflict of laws rules used to determine which country's descent laws and taxes apply to specific dispositions of property
- Use of trusts to safeguard assets
- Will drafting for multiple jurisdictions, with suggested forms
- Effect of treaties on estate planning

Asset protection planning is essential, yet traditional methods aren't usually sufficient to address today's financial realities. Rethinking how you utilize limited partnerships, limited liability companies, and trusts can help you navigate the liability exposures of

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the twenty-first century. Covering the techniques necessary to protect different asset classes as well as special planning structures such as entity trusts, group trusts, and enhanced IRA protection, authors Howard Rosen, Esq., and Patricia A. Donlevy-Rosen, Esq., offer an indispensable guide that educates professionals on the steps required to properly implement an effective asset protection structure for their clients. With attention given to fraudulent transfers, state law exemption planning, and selected offshore trust jurisdictions, the book also covers sources of liability exposure, reporting requirements for the United States, and IRS scrutiny of abusive trust arrangements. All in all, *Asset Protection: A Guide for Professionals* is an essential addition to your library if you are an attorney, accountant, or financial professional seeking to improve your understanding of asset protection planning in order to better serve your clients' wealth protection needs.

Strategies that are effective and legal for putting one's assets safely out of reach In today's increasingly litigious world, the shielding of assets has become a prominent issue for financial planners, business owners, and high-net-worth individuals. *Asset Protection* details methods that are both legally and morally legitimate for protecting one's assets from creditors, lawsuits, and scams. Bringing economic common sense and legitimacy to an area that is drowning in gimmickry, two of today's top lawyers examine the fundamental issues in this growing area, avoiding dense legalese to make the book accessible to anyone. *Asset Protection* covers everything readers want to

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know about: Establishing an effective asset protection program Today's most popular, established strategies Newer strategies that are still being resolved by the courts Swiss Annuities and Life Insurance examines the key characteristics of Swiss annuities and life insurance, and explains how the use of these products can help you achieve asset protection, growth, and, in some cases, significant tax planning opportunities. Swiss annuities and life insurance are an excellent alternative investment, particularly for high-net-worth individuals. With this expert guidebook, you too will learn how to safely capitalize on these attractive products.

Asset Protection Strategies Planning with Domestic and Offshore Entities

Attorney Mintz describes the latest strategies for insulating and shielding assets from potential lawsuit liability. Detailed examples, diagrams, and real life case studies are provided for using Family Limited Partnerships, Limited Liability Companies, Asset Protection Trusts, and creative privacy plans.

A PRACTICAL TAKE ON PROTECTING YOUR CLIENTS' ASSETS The only legal treatise on asset protection planning specific to California! An in-depth discussion of law, legal theory and the practicalities of implementing asset protection. The book is full of real-world client anecdotes and practical takeaways.

This updated volume brings together the knowledge of multiple experts in the field of asset protection to provide an in-depth, professional analysis and review of the key issues that lawyers and financial planning professionals face in advising clients on plans designed to

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achieve the goals of tax savings, providing for other family members, and protecting the estate from creditors.

Featuring the insights and strategies of leading asset protection strategist, Barry S. Engel, the Asset Protection Planning Guide helps advisors master the multitude of asset protection planning vehicles available, understand the strengths and weaknesses of those vehicles, and achieve the goals of clients. The ideal reference for estate planning attorneys, trust officers, tax practitioners, financial planners, and other wealth planners, the Guide covers every aspect of asset protection planning -- describing the various asset protection plans, when to use them, why specific strategies are used, and which countries to go to for protection. It describes the complex mix of tools and techniques available to the planner in designing successful, solid plans -- offering a wealth of practical advice, helpful "how-to's" and practice tools, sample documentation language, and a sample trust. This Second Edition reflects the most recent developments in asset protection planning, including coverage of the Bankruptcy Abuse Prevention and Consumer Protection Act of 2005.

The complexities of planning and administering an estate are clearly explained in this up-to-date and authoritative guide. This new edition covers the best techniques for transferring property through Irrevocable Life Insurance Trusts, gifting programs, paying grandchildren's medical and tuition expenses, and more. From wills, trusts, powers of attorney, and health care directives to probate and administering an estate, it's all here in easy-to-read, plain English. A five-step planning process details how to create and implement a sound estate plan.

This revised fifth edition from estate-planning expert Harvey J. Platt details the most up-to-date strategies for using a living trust to create a flexible estate plan. Platt explains the latest tax

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laws, including the American Taxpayer Relief Act of 2012, the broadening of statutes for amending trusts, and the rule against perpetuities (RAP). Platt also addresses updates on many existing topics, including lifetime exemptions; the estate, gift, and generation-skipping tax; charitable deductions; state estate tax savings; and private annuities. Your Living Trust & Estate Plan maps out the most effective techniques for saving money and property and covers the essentials of successful estate planning. Other resources frequently overlook vital areas such as unlocking the benefits of living trusts, protecting beneficiaries, using life insurance, handling retirement benefits properly, and fixing inadequate estate planning postmortem, but Your Living Trust is the complete guide. This invaluable resource will teach you how to maximize your family's assets, plan your estate, and provide for your loved ones well into the future.

What happens to your estate after you are gone is very much within your control. Estate planning is not only for the wealthy; it is for everyone. It is simply the process of deciding where your assets are to be distributed after your death. For those people who wish to preserve their assets for designated purposes — such as family or special charities — it becomes necessary to make special advance preparations. To ensure your assets are protected and final wishes are carried out, there are some common actions that should be taken now. Proper estate planning allows you to plan for yourself and your loved ones without giving up control of your affairs. Your estate plan should also allow for the possibility of your own disability. It should detail what you own and whom you want to leave it to at a time of your choosing and the way you want. Your estate plan should include fully disclosed, controlled costs for you and your loved ones. The last thing you want to worry about is having your estate drained of value through taxes and

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legal costs. The right plan can protect the value of your estate and spare your loved ones unnecessary hassles and legal conflicts. The Complete Guide to Planning Your Estate in Texas will help you glide through this complicated process. This new book has been adapted to offer Texas residents state-specific advice for estate planning. Author Linda C. Ashar, Attorney at Law, has crafted an estate planning primer, allowing Texas residents to become more informed and more involved during the process. Many books on estate planning indicate you do not need the services of an attorney, but this book highly recommends using an attorney versed in this area: You should not go through the process alone. This book is intended explain the complicated issues, terminology, and planning strategies of estate planning so when you do meet with a qualified attorney, you will be well prepared. You will understand the legal terms and be ready to discuss issues and strategies with familiarity, saving you time and legal fees and ensuring peace of mind. Texas -specific information is offered throughout this book, including: Texas's probate code; Texas rules, regulations, and laws specific to estate planning; elements of a valid Texas will; planning your living will in Texas; explanations of Texas laws regarding durable health care power of attorneys, do not resuscitate (DNR) orders, and directives to withhold CPR. The book's easy-to-understand context clarifies this complicated and sensitive subject and gives readers the power to take control of their future. This book also offers an overview of abatement rules, settlement costs, guardianship and minor children, executors and trustees, life insurance, potential long-term care needs, marital deductions, types of trusts, gift splitting, survivorship deeds, 529 plans, reducing or eliminating estate taxes, avoiding tax on life insurance, using insurance to pay estate taxes, gift tax issues, generation skipping transfer tax, and tax-deferred accounts.

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Estate planning should be a positive experience. It involves reviewing your situation and planning for your future. Although few people want to think about the possibility of disability or disease, advance planning is also a way to show your love and to reduce potential distress later. Other books offer a non-state-specific overview of estate planning, causing many readers to be misinformed about rules and regulations particular to their state; but, this new book provides information Texas residents need to know. Do not get outdated or wrong information that does not pertain to you specifically. Use this new book to craft an estate plan that is not only legally sound but also fully carries out your last wishes and protects your loved ones. Where will your wealth go when you go? Get peace of mind for you and your family with current and valid estate planning. The Australian Guide to Wills and Estate Planning helps you leave your wealth to your selected beneficiaries, avoid family disagreements and protect your financial legacy. This plain-English guide makes estate planning easy — providing exactly what you need to know to get started. You have spent substantial amounts of time and energy creating your wealth. However, planning how your wealth is to be distributed after your death likely receives little attention. It is common for people to consider preparing a will only when a personal life event brings the topic to the fore – the death of a family member or close friend, a personal health issue or overseas travel. The emotional stress and time constraints associated with such circumstances are avoidable if you plan your estate today. Wills and estates expert Andrew Simpson shares his extensive knowledge to help answer your questions and prepare for the future today. From planning your retirement, to writing a will, to distributing your assets, each aspect of estate planning is highlighted by informative case studies, practical examples and easy-to-read explanations. This clear, jargon-free guide answers your estate planning

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questions and enables you to understand the fundamentals of the estate planning process. Designed specifically for readers with little to no experience with wills and estate planning, this book will help you: understand the vital aspects of the estate planning process know what to look for when choosing a professional estate planner minimise tax burdens for yourself and your family use trusts to safeguard your assets protect your will from legal challenges. With the latest financial and tax guidelines, this is a must-have resource for anyone seeking to confidently pass on their wealth to future generations. The Australian Guide to Wills and Estate Planning is for anyone wishing an easy, stress-free way to sort their affairs and enjoy peace of mind.

A tax-smart guide to keeping more of the wealth you build Three obstacles to wealth-lawsuits, income taxes, and estate taxes-can and will destroy the financial achievements of those who fail to properly safeguard their assets. In this book, attorney and tax strategist J.J. Childers lays out a plan for combating these forces so that anyone willing to learn and apply the secrets of the wealthy can do so in a smart, simple, and effective way. J.J. Childers (Little Rock, AR) is a licensed attorney specializing in wealth structures that reduce taxes and shield assets. He speaks on these topics to thousands of individuals, investors, and small business owners each year. His unique ability to explain complicated strategies in simple terms has made him one of the nation's most sought-after speakers and practitioners on asset-protecting legal structures. Asset Protection in Florida covers all facets of asset preservation for Florida residents. The Fourth Edition manual provides comprehensive analysis of the many steps available to protect assets from creditors' claims, both during your

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lifetime and at death. Among the many topics covered are homestead, trusts (both domestic and offshore), business planning, planning for dissolution of marriage, protection of retirement and education accounts, and the ethical aspects of advising clients on asset protection issues. Bankruptcy issues and tax planning are prominently featured throughout the text. The eBook versions of this title feature links to Lexis Advance for further legal research options.

A complete guide to planning an estate under today's tax rules When it comes to your estate-no matter how big or small it may be-you shouldn't leave anything to chance. Proper planning is necessary to protect both your assets and your heirs. Experts Stewart Welch III, Harold Apolinsky, and Craig Stephens know this better than anyone else, and in the Third 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. Packed with up-to-the-minute facts, this practical resource covers essential issues; including how new legislation will impact inheritances and trusts, the do's and don't of gifting, retirement planning, and much more. Reflects the most recent changes in tax laws as applicable to estate taxation Offers useful planning with regard to trusts, charitable contributions, life insurance, and wills Outlines the best ways to preserve your wealth through proper planning strategies Filled with in-depth insights and expert

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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.

“Our #1 choice in estate planning books.” –Ken & Daria Dolan The bestselling guide to securing a sound financial future for you and your loved ones—updated for uncertain times In our time of political, social, and economic upheaval, taking steps to protect your estate isn’t enough to provide peace of mind for you or financial security for your loved ones. Given these new levels of uncertainty, you need to reduce risk by using life insurance and other financial products to fund estate planning. This new, fully updated edition of the estate planning classic helps you take your estate planning to the next level. In addition to all the basics on wills, jointly held property, taxation, and philanthropy, *Protect and Enhance Your Estate* covers the latest developments regarding: Disability planning Living trusts Asset protection Family limited partnerships Proper use of life and long-term care insurance

Nationally known estate planning authority Louis A. Mezzullo provides comprehensive yet practical advice for designing an effective buy-sell agreement to be used as an exit strategy or as part of the succession or estate planning process. He explains what to consider when drafting an agreement for a C or S corporation, a partnership, or a limited liability company. Tools include the

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suggested terms of a well-drafted agreement, discussions about funding options, tax consequences, and valuation. Includes CD-ROM with sample agreements. Plan ahead: estate planning to secure your wishes Estate Planning is your overview of the estate planning concepts that are necessary to consider when advising your clients about the different facets of wealth transfer planning. This fundamental reference presents the basic estate, gift, and trust planning ideas in a descriptive and accessible manner—allowing you to easily and conveniently access the information you need when you need it. This essential text covers the development of estate planning strategies for your clients, the fundamentals of the federal transfer tax system, relevant federal income tax rules, lifetime donative asset transfers, gratuitous property transfers at death, generation-skipping transfers, special property transfer planning considerations, and post-mortem planning. When done effectively, estate planning enables your clients to make both lifetime and testamentary transfers of assets to beneficiaries of their choice. In the process, strategic, successful estate planning strategies conserve wealth for these beneficiaries, who are often family members of the client. Leveraging the right methods of estate planning can ensure that you achieve your client's objectives. Explore the fundamentals of estate planning as they relate to wealth transfer planning Dive into special property transfer planning

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considerations, including community property, life insurance, charitable transfers, closely held corporations, etc. Better serve your clients by having access to relevant, easy to navigate information on estate planning best practices Reinforce these new ideas with a comprehensive test bank Estate Planning is your guide to estate planning concepts that help you protect your assets during wealth transfer—and prepare for your assets to change hands as smoothly as possible.

Planning for your family's future made easy! If you're like most people, you want to be sure that, once you've passed on, no more of your property and money will be lost to the government than is absolutely necessary. You want to know that you'll be leaving your heirs your assets and not your debts. You want to be absolutely certain that your will is ship-shape, your insurance policies are structured properly, and that every conceivable hole in your estate plan has been filled. And most of all, you'd like to do all of this without driving yourself crazy trying to make sense of the complicated jargon, jumble of paperwork, and welter of state and federal laws involved in the estate planning process. Written by two estate planning pros, this simple, easy-to-use guide takes the pain out of planning for your ultimate financial future. In plain English, the authors walk you step-by-step through everything you need to know to: Put your estate into order

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Minimize estate taxes Write a proper will Deal with probate Set up trusts Make sure your insurance policies are structured properly Plan for special situations, like becoming incompetent and pet care Craft a solid estate plan and keep it up-to-date Don't leave the final disposition of your estate up to chance and the whims of bureaucrats. Estate Planning For Dummies gives you the complete lowdown on: Figuring out what you're really worth Mastering the basics of wills and probate Using will substitutes and dodging probate taxes Setting up protective trusts, charitable trusts, living trusts and more Making sense of state and federal inheritance taxes Avoiding the generation skipping transfer tax Minimizing all your estate-related taxes Estate planning for family businesses Creating a comprehensive estate plan Straightforward, reader-friendly, easy-to-use, Estate Planning For Dummies is the ultimate guide to planning your family's future.

Death and taxes are what most people are planning for in traditional estate plans, but this type of planning does nothing to protect your family from the things that are actually destroying America's wealth and health. Learn why modern estate planning is more about asset protection than ever before. With this book you'll discover how to protect: * Your assets from devastating healthcare costs! * Your estate from changes in the tax law! * Yourself and your spouse from predators! *

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Your family from remarriages and divorces! * Your grandchildren from losing their inheritance!

Self-help/how-to by a lawyer on Medicaid use by elders in Florida.

Making a last will is the only way for you to take control over these matters and to properly provide for your loved ones. Enodare has taken its years of estate planning experience and created a simple book to guide you through the process of making a last will. It's called "Make Your Own Last Will & Testament". Make Your Own Last Will & Testament will provide you with all you need to make your own customized last will.

You will learn about last wills, making gifts, executors, intestacy, probate, estate tax, and much more. We'll show you how to: easily make a valid last will & testament ; amend or revoke an existing last will & testament ; make cash and specific item gifts ; appoint executors to wind up your estate ; appoint guardians to care for your children ; provide for the management of property gifted to young beneficiaries ; make funeral arrangements; and much more.--publisher.

Practical Guide to Estate Planning provides an overview of estate planning, offering the widest variety of discussion on planning principles and tools from the simple to the sophisticated. This book is not lacking in detail, witnessed by its well-annotated collection of forms that will appeal to many experienced estate planners. The layout of this book reflects its emphasis on simplicity and clarity. It is divided into four major sections, the first of which provides a general view of the estate planning process.

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SIMPLE, AFFORDABLE STEPS YOU CAN TAKE TO PROTECT WHAT'S YOURS By the time you're named as a defendant in a lawsuit or divorce proceeding, it may be too late to protect your assets. The time to shield the hard-won fruits of your labor is now! Fortunately, protecting your assets can be much easier and far less expensive than you think. In this complete, practical, and easy-to-follow guide, leading tax and estate planning attorney and bestselling author Martin Shenkman presents the steps you can and should take to protect your home, your savings, and other assets from creditors, litigants, and divorce. Shenkman explains the essential concepts of protecting what you own from malpractice claims, lawsuits, and divorce. This book offers step-by-step guidance in determining which asset-protection strategies and techniques are right for you. You'll learn numerous legal and effective methods you can use to:

- * Protect your personal assets from business and professional claims
- * Protect your assets and your heirs' assets from divorce
- * Minimize your risk of lawsuits and other claims against your assets
- * Create limited partnerships and LLCs to protect your assets
- * Make your home-based business judgment-proof
- * Use domestic trusts to protect against lawsuits
- * Secure real estate and stock holdings against lawsuits

This book will help you plan your estate such as wills, trusts, powers of attorney, healthcare directives, probate fee transfers of assets ect ...

Congratulations! You have worked hard for many years and own a booming business; or perhaps you are a successful doctor, attorney, CPA, or another high-income earner.

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Making that money was difficult; now, you have to create a strategy to keep it. Unfortunately, you are on the radar with pending lawsuits from other businesses, employees, business partners, past marriages, relatives, the government, or anyone else who thinks they can reach your assets. With a little knowledge and access to the Internet, anyone can discover a lot of information about you, including: your home, cars, boats, real estate, bank, and investment accounts -- essentially everything you own. On average, 80,000 lawsuits were filed in 2006 each day. Fortunately, you can act now to protect yourself and family later. In this easy-to-read and comprehensive book, you will learn the simple steps you need to do to protect yourself before there is a problem. The book provides a number of worksheets to help you decide the best plan of action for your financial position and personal needs. You will learn the ins and outs of protecting yourself and your family through legal methods, such as corporations, family limited partnerships and trusts, family saving trusts, offshore trusts corporations, and limited liability companies (LLCs). You will learn how to reposition your assets into legal entities that you control, creating bullet-proof security. You will learn about irrevocable living trusts, creating and maintaining LLCs, equity-stripping techniques, privacy plans, durable power of attorney, bankruptcy legislation, and estate planning for high-income individuals, as well as living, testamentary, and pour-over wills. The trick is to own nothing directly but control everything legally.

Using a case-study and problems approach, Estate Planning: Principles and Problems,

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Second Edition, introduces students To The principles of estate planning - progressing from fundamental to complex issues - and then encourages application of those principles by asking students to analyze short problems and exercises using real life client situations. This comprehensive and straightforward Coursebook Series paperback includes a CD containing a broad assortment of common and necessary forms employed in an estate planning practice that can be used to provide students with the drafting experience they will need as practicing attorneys. This hands-on coursebook is organized for maximum effect: fundamental issues are discussed first, then the authors move on to more complex issues, providing the student with the building blocks necessary to master the topics each chapter begins with an overview of topics covered, followed by a more detailed discussion of legal doctrines and principles case studies and exercises emphasize problems and solutions that arise in the actual estate planning process exercises and case studies explore a broad variety of issues and allow flexibility in teaching adaptable organization presents a life-cycle progression reflecting the changing needs of clients from youth through old age, and modest wealth to significant wealth an electronic forms supplement in CD effectively supports a drafting component To The course, essential to master the techniques coverage of federal tax issues is provided for those who wish to teach it, but the topic can be taught or omitted at the instructor's discretion a bibliography at the end of each chapter provides extensive reference sources Completely revamped with a new cover and a

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new title that better reflects its scholarly nature and comprehensive scope, The Second Edition offers further refinements: updated text to reflect developments in particular subject matters such as the Health Insurance Portability and Accountability Act of 1996, Circular 230 opinion letters, Rule Against Perpetuities, same-gender relationships, asset protection and Medicaid planning revised forms to reflect changes in the law since the First Edition Chapter 16 has been expanded into two chapters: one providing a comprehensive overview of the wealth transfer tax and planning techniques, and the other dealing with probate administration and preparation of the federal estate tax return now includes full texts of crucial cases and rulings, As well as teachable cases, such as: People v. Berge (attorney conflict of interest ethical discipline case) in Re Marriage of Guinn (marital property division case) Estate of Maria Cristofani (Crummey trusts) Revenue Ruling 2004-64 (defective grantor trusts) Revenue Ruling 95-58 (settlor's power to choose trustees) Audrey J. Walton (zeroed-out GRATs) Revenue Ruling 93-12 and Technical Advice Memorandum 9436005 (minority interest discounts) Revenue Ruling 66-167 (waiver of personal representative fees) Revenue Ruling 2006-26 (QTIP IRA trusts) Give your students the best preparation possible For The issues they will face in estate planning. Estate Planning: Principles and Problems, Second Edition , provides the opportunity for students not only to analyze realistic case studies but to experience the hands-on preparation of the appropriate forms and documents.

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The Living Trust Plus Asset Protection Trust protects your assets from probate PLUS lawsuits PLUS the catastrophic expenses often incurred in connection with nursing home care. The Living Trust Plus is the only type of self-settled asset protection trust that allows a settlor to be trustee and retain an interest in the trust while also protecting the assets from being counted by state Medicaid agencies. Even though the Living Trust Plus is irrevocable, you retain a high degree of control over your trust assets because: (1) you can be the trustee if desired; (2) you can retain the right to receive all of the trust income; (3) you have the right to live in and use your real estate; (4) you have the right to change trustees; and (5) you have the right to change beneficiaries. Evan H. Farr, Certified Elder Law Attorney, is the creator of the Living Trust Plus Asset Protection System used by dozens of Estate Planning and Elder Law Attorneys around the country, and is widely recognized as one of the foremost experts in the nation in the field of Medicaid Planning and Medicaid Asset Protection Trusts. Evan has been recognized as one of the nation's top lawyers by SuperLawyers.com, Martindale-Hubbell, Best Lawyers in America, and Newsweek Magazine. A nationally-renowned Best-Selling author and frequent educator of attorneys across the U.S., Evan is known as the "expert to the experts," having educated tens of thousands of attorneys across the country. His numerous publications include a Best-Selling book, *Protect and Defend, the Nursing Home Survival Guide*, as well as two legal treatises published by the American Law Institute in affiliation with the American Bar Association: *Planning and Defending Asset Protection Trusts and Trusts for Senior Citizens*."

A revocable living trust is a type of trust created for the purpose of holding ownership of an individual's assets during that person's lifetime, and for distributing those assets after their death. This particular type of trust can be an excellent tool for solving a number of issues

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confronting individuals and families today, including the avoidance of probate, the management of property during periods of incapacity, the protection of property for beneficiaries who can't handle an inheritance on their own, protecting assets from disgruntled heirs, the elimination or minimization of federal estate taxes, and the assurance that personal affairs will remain private. This self-help legal book provides you with step-by-step instructions, detailed information and all the legal forms necessary to enable you to establish your own revocable living trust.

For the first time, two of the nation's foremost asset protection planners pool their collective knowledge to bring you *Asset Protection ...in financially unsafe times*. The result of over 3 years of extensive research, *Asset Protection ...in financially unsafe times* is the most comprehensive, up-to-date book on asset protection available. With over 440 references, it thoroughly examines asset protection fundamentals as well as the most cutting-edge strategies. The authors dispel much of the hype and misinformation surrounding asset protection, with in-depth analysis of relevant case law, statute law, and other authoritative source material in easy-to-understand language. Many of these strategies are not found in any other book, and are only used by a few of the nation's best planners, including: Non-qualified personal residence trusts (NQPRTs) Equity stripping via both debt-based and obligation-based liens UFTA Section 8(a) defense strategies Disregarded Entity Multi-Member LLCs (DEMMLLCs) Synthetic Roth IRAs (SynRoths) Billing and Collections Companies (BICOCOs) for protecting accounts receivable (A/R) (a superior alternative to A/R financing arrangements) Offshore self-directed IRAs Ultimate LLCs (ULLCs) Series LLCs Defective Beneficiary-Taxed Trusts (DBETTs) Do you see these strategies being discussed in other

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books? That's because other books are not at the cutting edge of asset protection planning. This book is at the cutting edge of Asset Protection! In addition to the foregoing, this book explores more conventional asset protection tools and theory, such as: Fraudulent transfer law Corporations LLCs Exemption planning, including bankruptcy exemptions Co-ownership strategies and pitfalls (tenants by the entirety, community property ownership, tenants in common, etc.) Limited Partnerships for asset protection and estate planning Trusts for asset protection and estate planning Offshore LLCs, trusts, and other offshore planning tools Foreign Insurance and global investing Finally, this book discusses asset protection as a holistic, wealth preservation discipline, as well as the application of asset protection to specific circumstances, which include: A thorough overview of estate and gift taxes A description of both simple and advanced estate planning strategies, and how those strategies are integrated into a comprehensive asset protection and estate plan Pre-bankruptcy planning Pre-divorce/pre-marital planning Reinforcing one's wealth against market meltdowns Asset protection and the IRS Asset Protection... in financially unsafe times is thus an essential resource for professionals, their clients, and anyone who wants to learn about the most effective asset protection and estate planning tools available.

Have you ever considered the advantages of creating a living trust? Avoiding probate through the use of living trusts is a well-known solution, but author Evan H. Farr takes this issue one step further. In *Protecting Your Assets from Probate and Long-Term Care*, Farr explains the need to consider both probate and the expenses of long-term care when you create a living trust. A revocable living trust, the main tool used for protecting your assets from probate, does not protect assets from the catastrophic expenses of long-term care. A very useful and popular

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estate planning tool, revocable living trusts are recommended by tens of thousands of attorneys across the United States and are used as the central estate planning document by millions of Americans. However, what most Americans don't realize is that assets in such a trust are not protected from lawsuits or from the limitless expenses associated with nursing homes or long-term care. In order to help readers protect themselves from both probate and long-term care, Farr delves into the many details you should know when creating a living trust. He also outlines his Living Trust Plus™ Asset Protection Trust, which is the only type of self-created asset protection trust that allows you to avoid probate and retain an interest in the trust while also protecting the assets from being counted by state Medicaid agencies. He details the process of avoiding probate and securing assets, including: Joint ownership problems Special needs planning How to pay for the nursing home Why Medicaid planning is ethical The ten most common Medicaid myths Finding the right lawyer Protecting Your Assets from Probate and Long-Term Care will help to ensure your family does not have to reap the consequences (and expenses) of improperly creating a living trust.

"As an asset protection lawyer, I think Mandell and Jarvis brilliantly explain the most effective wealth protection strategies. A must-read for advisors and clients alike." -Arnold S. Goldstein, PhD, LL.M., JD author, Asset Protection Secrets "I really appreciate the 'Risk Factor Analysis.' It is a unique tool for diagnosing-and then solving-some of the toughest problems in maintaining and protecting your wealth." -Gordon Klein, JD, CPA, lecturer, UCLA's Anderson Graduate School of Management, frequent CNBC Commentator "Chris and David's concept of a 'Personal Economy' should be heeded by every individual investor. If you want to grow and shield what's yours, this book is a great start." -Jonathan Guryan, PhD, Asst. Professor of

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Economics University of Chicago Graduate School of Business The interest in protecting one's wealth is universal. *Wealth Protection: Build and Preserve Your Financial Fortress* serves as the ultimate handbook for readers who want to build their family's financial fortress and shield it from potential risks.

This is the first and only book in print on asset protection planning specific to California residents. It presents a sophisticated and in-depth look at the law in an easy to read and understand manner. Full of practical advice and real-life stories, it covers many commonly used asset protection techniques and structures. Learn what you can do today to protect your home and life savings!

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