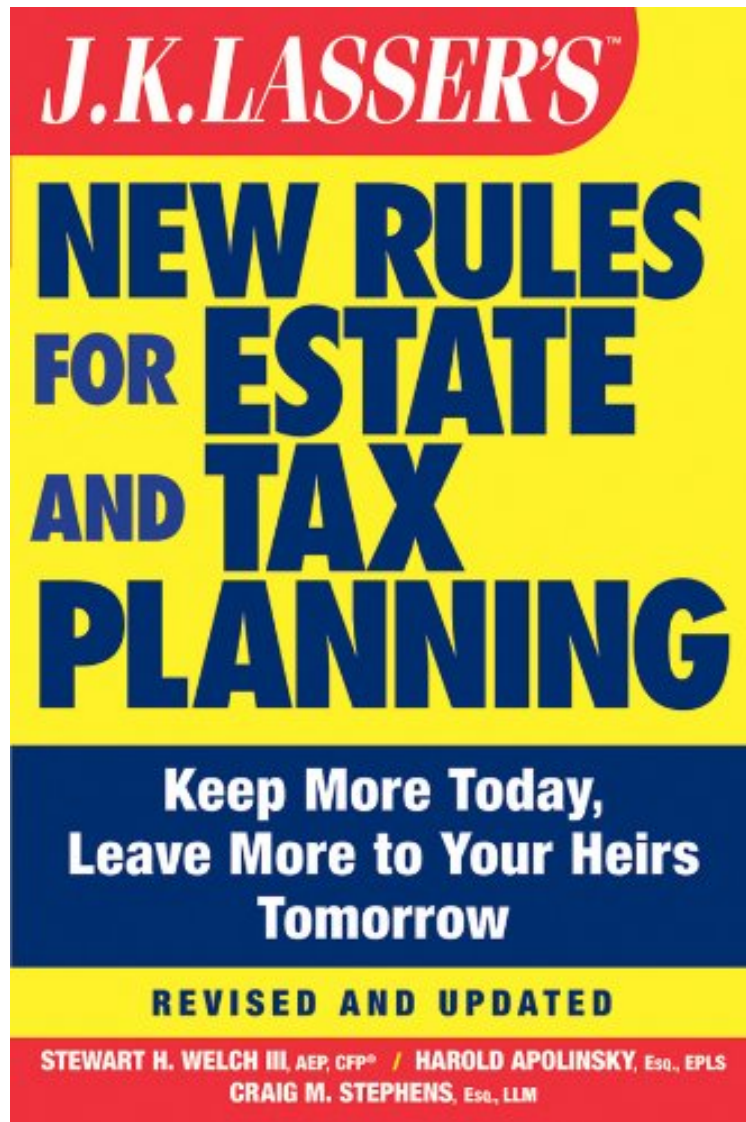


JK Lasser's New Rules for Estate and Tax Planning (J.K. Lasser)

Stewart H. Welch, Harold I. Apolinsky, Craig M. Stephens
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Stewart H. Welch, Harold I. Apolinsky, Craig M. Stephens : JK Lasser's New Rules for Estate and Tax Planning (J.K. Lasser) 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 and Tax Planning (J.K. Lasser):

7 of 7 people found the following review helpful. Good Overview of Estate PlanningBy RussellBThis book provides a good overview of estate planning. I am an attorney who is going to be adding estate planning to my practice in the near future and this book has a lot of good information. Some people have complained that this book is too focused on using an attorney for estate planning. This is a strength and not a weakness. Estate planning is not something that a person should try to do without an estate planning attorney. Tax law is too fluid and there are too many subtle nuances

for the lay person to stay on top of changes in their state probate law and federal tax law. There are three really good reasons to have a professionally prepared estate plan: 1) minimize stress on your heirs after you pass; 2) ensure that you maximize the amount of your money that goes to your heirs and not Uncle Sam; and 3) ensure that your estate goes where you want it to go after you pass. This book will save you money. A client who comes into their attorney's office properly prepared, will require less of the attorney's time, and will therefore be billed less. Understanding the basic concepts of proper estate planning and properly organizing will minimize the amount of work necessary to prepare the estate plan and help you explain to your attorney what you want the goals of your estate plan to be. 9 of 9 people found the following review helpful. OUT OF DATE By Dr. GF This edition was published in 2012 and does not reflect the latest congressional action on the Estate Tax. As such it is not up to date and not the best guide to the future of estate planning. 0 of 0 people found the following review helpful. Five Stars By Customer excellent tax book

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 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.

From the Back Cover A complete guide to planning an estate under today's tax rules When it comes to planning an estate under today's ever-changing tax rules, you can't leave anything to chance. Proper planning is necessary to protect both your assets and your heirs. Estate Planning Law Specialists Harold Apolinsky and Craig Stephens and expert financial planner Stewart Welch III know this better than anyone else. Now, in the fully revised and updated 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'ts of gifting, retirement planning, and much more. Filled with in-depth insights and expert advice, the J.K. Lasser's New Rules for Estate and Tax Planning also: 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 Written in a straightforward and accessible style, this timely guide will show you how to efficiently arrange your estate today so that you can leave more to those you care about tomorrow. About the Author STEWART H. WELCH III, AEP, CFPreg;, is a nationally recognized financial advisor who is widely quoted in the press, including Money magazine, Worth, and the Wall Street Journal. He has appeared on CNN, CNBC, and Fox News. Welch's company, The Welch Group, LLC, is a fee-only, wealth management and financial advisory firm serving wealthy families throughout the United States. HAROLD APOLINSKY, Esq., EPLS, is a board-certified estate planning attorney with the law firm Sirote Permutt, PC, in Birmingham, Alabama. He served for over twenty-five years as an adjunct professor of estate planning at both the Cumberland School of Law and The University of Alabama School of Law. CRAIG M. STEPHENS, Esq., LLM, is a tax attorney specializing in estate planning and family business succession planning. He is former president and board member of the local chapter of the National Committee on Planned Giving. Stephens is cochairman of his firm's estate and trust planning practice group at Sirote Permutt, PC, in Birmingham, Alabama.