

# FREE ACCESS THE DESTRUCTIVE POWER OF FAMILY WEALTH A GUIDE TO SUCCESSION PLANNING ASSET PROTECTION TAXATION AND WEALTH MANAGEMENT THE WILEY FINANCE SERIES

## The Destructive Power of Family Wealth

Wealth owners are responsible for more than just assets The Destructive Power of Family Wealth offers thoughtful, holistic planning to ensure that your wealth remains a positive force for your family. While today's families have become global and the world has become smaller and more mobile, we have not yet become immune to the problems wealth poses to the family unit. This book provides authoritative guidance on family wealth management, with an emphasis on both family and wealth. Global taxation regimes, changing bank secrecy laws, asset protection and other critical issues are examined in depth to assist wealth owners in planning, and the discussion includes details on the essential tools that aid in the execution of any wealth management strategy. More than a simple financial planning guide, this book also delves into the psychology of wealth, and the effect it has on different family members; wealth destroys families every day, and smart management means maintaining the health of the family as much as it means maintaining and expanding wealth. Family wealth brings advantages, but it also carries a potential for destruction. Wealth owners have a responsibility to their families and to themselves, and this book provides the critical guidance you need to get it right, whether you are part of a wealth-owning family or are an advisor to wealth-owning families. Learn how careful planning can prevent family strife Protect assets from risks ranging from divorce to political upheaval Explore the many tools that facilitate secure wealth management Discover how changing global regulations affect wealth Understand how private banks and other advisors work Uncover challenges faced by the wealth management industry Find out how to work with advisors and to manage costs while ensuring efficient and effective outcomes Families at all levels of wealth are vulnerable to shifting economic climates, evolving regulatory issues, asset threats and more. Any amount of wealth is enough to shatter a family, but deeply intentional planning based on thoughtful consideration is the key to keeping destructive forces at bay. The Destructive Power of Family Wealth provides expert guidance and a fresh perspective to help you maintain both family and wealth. For those in the wealth management industry and for other advisors to wealth-owning families, The Destructive Power of Family Wealth contains insight on the needs of today's wealth-owning families, ways in which the tools of wealth planning address those needs and guidance on what it takes to be a successful, trusted family advisor.

## The Destructive Power of Family Wealth

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changing bank secrecy laws, asset protection and other critical issues are examined in depth to assist wealth owners in planning, and the discussion includes details on the essential tools that aid in the execution of any wealth management strategy. More than a simple financial planning guide, this book also delves into the psychology of wealth, and the effect it has on different family members; wealth destroys families every day, and smart management means maintaining the health of the family as much as it means maintaining and expanding wealth. Family wealth brings advantages, but it also carries a potential for destruction. Wealth owners have a responsibility to their families and to themselves, and this book provides the critical guidance you need to get it right, whether you are part of a wealth-owning family or are an advisor to wealth-owning families. Learn how careful planning can prevent family strife Protect assets from risks ranging from divorce to political upheaval Explore the many tools that facilitate secure wealth management Discover how changing global regulations affect wealth Understand how private banks and other advisors work Uncover challenges faced by the wealth management industry Find out how to work with advisors and to manage costs while ensuring efficient and effective outcomes Families at all levels of wealth are vulnerable to shifting economic climates, evolving regulatory issues, asset threats and more. Any amount of wealth is enough to shatter a family, but deeply intentional planning based on thoughtful consideration is the key to keeping destructive forces at bay. The Destructive Power of Family Wealth provides expert guidance and a fresh perspective to help you maintain both family and wealth. For those in the wealth management industry and for other advisors to wealth-owning families, The Destructive Power of Family Wealth contains insight on the needs of today's wealth-owning families, ways in which the tools of wealth planning address those needs and guidance on what it takes to be a successful, trusted family advisor.

## **Wealth of Wisdom**

A critical resource for families managing significant wealth Wealth of Wisdom offers essential guidance and tools to help high-net-worth families successfully manage significant wealth. By compiling the 50 most common questions surrounding protection and growth, this book provides a compendium of knowledge from experts around the globe and across disciplines. Deep insight and thoughtful answers put an end to uncertainty, and help lay to rest the issues you have been wrestling with for years; by divulging central lessons and explaining practical actions you can take today, this book gives you the critical information you need to make more informed decisions about your financial legacy. Vital charts, graphics, questionnaires, worksheets and other tools help you get organised, develop a strategy and take real control of your family's wealth, while case studies show how other families have handled the very dilemmas you may be facing today. Managing significant wealth is a complex affair, and navigating the financial world at that level involves making decisions that can have major ramifications — these are not decisions to make lightly. This book equips you to take positive action, be proactive and make the tough decisions to protect and grow your family's wealth. Ensure your personal and financial success and legacy Access insight and data from leading experts Adopt the most useful tools and strategies for wealth management Learn how other families have successfully navigated common dilemmas When your family's wealth is at stake, knowledge is critical — and uncertainty can be dangerous. Drawn from interactions with hundreds of wealthy individuals and families, Wealth of Wisdom provides a definitive resource of practical solutions from the world's best financial minds.

## **An Anatomy of Tax Havens**

Tax havens in offshore lands like Switzerland, the Cayman Islands and the Bahamas were once considered a rarity, the preserve of the super-rich. Today, they are big business available to the masses. Their goal? To avoid any form of accountability. Own nothing. Possess everything. Be answerable to no one. Where are these tax havens? What forms can they take? What future lies in store for them, and why should we care? An Anatomy of Tax Havens: Europe, the Caribbean and the United States of America answers these questions, and more, in the first comparative study in one volume of European, Caribbean and United States tax havens. It examines their simple origin to the extreme forms some take today, delving into the murky subculture that has deliberately made them impenetrably obscure. Uniquely, it combines detailed technical expertise

(regulatory regimes, financial crime, legal and equitable structuring) with an analysis of their impact on domestic and global political, economic, environmental and social concerns. *An Anatomy of Tax Havens* is a fascinating, informative read for a broad readership; from legal, accountancy and tax practitioners to compliance regulators, law enforcement agencies, and students and researchers interested in business studies, taxation, and crime.

## **Succession and Tax Planning Through Trusts and Wills**

How to bequeath your wealth to your successors — and save taxes Trusts and Wills are two ways of legally distributing your wealth to your intended successors or other beneficiaries. Intelligently planned, these two methods can also help you save tax for yourself and your successors. While Wills are better known, tax and succession planning through private or family trusts is also a tried and tested way of transferring assets and creating income for your successors, including unborn persons. In fact, private trusts have several great advantages over a Will. While a Will is often challenged in the courts — and the resultant dispute can take years to be settled — a properly created trust can help you pre-empt any such family strife. Secondly, by creating the right trust you can pass on your wealth even during your lifetime. This book offers expert guidance on how to bequeath your wealth as you want, whether by means of trusts or through a valid Will, in a tax-efficient manner: \* The various types of private and family trusts you can set up. \* Principles and procedure for creating a valid private trust. \* Advantages and tax planning aspects of private trusts. \* The concept and advantages of a living trust. \* How to transfer wealth to your family members, including minor children, during your lifetime through a trust. \* How to draft, execute and register your Will. \* What you can bequeath through your Will — and what you can't. \* How to create a new HUF through a Will. \* Ready-to-use drafts of typical Wills.

## **Tax And Succession Planning Through Trusts And Wills**

Trusts and Wills are both means for legally distributing your wealth to your intended successors or other beneficiaries. Intelligently planned, both can also help you save tax for yourself and your successors. While Wills are better known, tax and succession planning through private - or, family - trusts is equally a tried and tested method for transferring assets and creating income for your family members, including unborn persons. In fact, private trusts have several great advantages over a Will. While a Will is often challenged in the courts - and the resultant dispute can take years to be settled - a properly created trust will avoid any such family strife. Secondly, through a trust you can pass on your wealth even during your lifetime. This book offers you both expert guidance on how to distribute your wealth as you want and save taxes whether by means of trusts or through a valid Will in a tax-efficient manner

## **Portfolio Management in Practice, Volume 1**

*Portfolio Management in Practice, Volume 1: Investment Management* delivers a comprehensive overview of investment management for students and industry professionals. As the first volume in the CFA Institute's new *Portfolio Management in Practice* series, *Investment Management* offers professionals looking to enhance their skillsets and students building foundational knowledge an essential understanding of key investment management concepts. Designed to be an accessible resource for a wide range of learners, this volume explores the full portfolio management process. Inside, readers will find detailed coverage of: Forming capital market expectations Principles of the asset allocation process Determining investment strategies within each asset class Integrating considerations specific to high net worth individuals or institutions into chosen strategies And more To apply the concepts outlined in the *Investment Management* volume, explore the accompanying *Portfolio Management in Practice, Volume 1: Investment Management Workbook*. The perfect companion resource, this workbook aligns chapter-by-chapter with *Investment Management* for easy referencing so readers can draw connections between theoretical content and challenging practice problems. Featuring contributions from the CFA Institute's subject matter experts, *Portfolio Management in Practice, Volume 1: Investment Management* distills the knowledge forward-

thinking professionals will need to succeed in today's fast-paced financial world.

## **Estate and Business Succession Planning**

Written by two attorneys who specialize in estate planning, this book clarifies all the issues involved in planning an estate and transferring wealth. It offers comprehensive estate planning guidelines, including creating a will, designating power of attorney, trusts, and life insurance, and includes up-to-date estate and inheritance tax information.

### **J.K. Lasser ProEstate and Business Succession Planning**

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. Please visit our Web site at [www.jklasser.com](http://www.jklasser.com)

### **2022 CFA Program Curriculum Level III Box Set**

Prepare for success on the 2022 CFA Level III exam with the latest official CFA® Program Curriculum. The 2022 CFA Program Curriculum Level III Box Set contains all the material you need to succeed on the Level III CFA exam in 2022. This set includes the full official curriculum for Level III and is part of the larger CFA Candidate Body of Knowledge (CBOK). Designed to acclimate you to the exam's heavy reliance on information synthesis and solution application regarding portfolio management and wealth planning, the Level III curriculum will help you master both calculation-based and word-based problems. Highly visual and intuitively organized, this box set allows you to: Learn from financial thought leaders. Access market-relevant instruction. Gain critical knowledge and skills. The set also includes practice questions to assist with your recall of key terms, concepts, and formulas. Perfect for anyone preparing for the 2022 Level III CFA exam, the 2022 CFA Program Curriculum Level III Box Set is a must-have resource for those seeking the advanced skills required to become a Chartered Financial Analyst®.

### **Covering Your Assets**

COVERING YOUR ASSETS is not a guide on how to accumulate assets. It is written specifically for people who have already accumulated assets, or are on their way to doing so, and wish to preserve and protect those

assets. It is written in a unique format that will allow you to isolate your specific life situation and read only material applicable to you. You will learn about what the Wealth Planning process should actually entail, the Thirteen Wealth Management Issues (twelve of which that are ignored by many Financial Planners), the synergy that should come from the integration of these oft-ignored issues, and how to properly build a Wealth Planning Team. Twenty-seven complex strategies and techniques are explained in simple terms and presented in such a way that they can be easily understood by any layman. COVERING YOUR ASSETS is an informative, enjoyable and easy to read guide for anyone wishing to Preserve and Protect what they have accumulated.

## **Financial Times Guide to Inheritance Tax , Probate and Estate Planning**

Nearly 9.5 million households in Britain will have to pay inheritance tax. What's the best way to avoid it? If you're administering an estate because someone has died, how do you obtain probate? Is it ever possible to retrospectively minimize an estate's tax liabilities? The Financial Times Guide to Inheritance Tax, Probate and Estate Planning will help you navigate the complicated maze of inheritance tax, probate, and estate planning. Amanda Fisher tells you what to do when someone dies, helps you deal with administrative affairs and distribute the estate to beneficiaries, offers long-term strategies on how to protect your estate and minimize any potential inheritance tax liability, including the use of trusts. The Financial Times Guide to Inheritance Tax, Probate and Estate Planning: · Explains what to do when someone has died including how to register the death · Advises on the duties of executors and administrators and how to consider the validity of a will · Helps you apply for the grant of probate or letters of administration · Guides you through the completion of inheritance tax returns and how to calculate and pay any tax due · Provides advice on lifetime planning and illustrates ways to minimize potential inheritance tax liabilities The Financial Times Guide to Inheritance Tax, Probate and Estate Planning will help you face the difficult task of dealing with an estate when someone has died. You'll learn the best way to manage the process of acquiring probate and complete the administration of the estate, before distributing to the beneficiaries. You will also have an insight to the advantages of make a will and organizing your estate efficiently to minimize any future impact of inheritance tax, including the use of trusts. The Financial Times Guide to Inheritance Tax, Probate and Estate Planning covers: Registering a death The duties of the executors and administrators Consideration of the validity of a will Intestacy and partial intestacy Obtaining details of assets and liabilities Applying for the grant of probate and the letters of administration How income and gains are treated before and after the date of death Valuing property for inheritance tax Calculating the inheritance tax liability and completing the inheritance tax return forms Consideration of tax planning and deeds of variation Paying the inheritance tax Distributing the estate to the beneficiaries Lifetime planning to reduce an inheritance tax liability The benefits of making a Will Trusts Glossary of key terms

## **Moneyland**

A SUNDAY TIMES BESTSELLER PRESENTER OF THE BBC RADIO 4 SERIES 'HOW TO STEAL A TRILLION' SHORTLISTED FOR THE ORWELL PRIZE 2019 SUNDAY TIMES BUSINESS BOOK OF THE YEAR AN ECONOMIST POLITICS AND CURRENT AFFAIRS BOOK OF THE YEAR A DAILY MAIL AND TIMES BOOK OF THE YEAR 'You cannot understand power, wealth and poverty without knowing about Moneyland.' Simon Kuper, New Statesman 2019: democracy is eating itself, inequality is skyrocketing, the system is breaking apart. Why? Because in 1962, some bankers in London had an idea that changed the world. That idea was called 'offshore'. It meant that, for the first time, thieves could dream big. They could take everything. Join investigative journalist Oliver Bullough on a journey into the hidden world of the new global kleptocrats. See the poor countries where public money is stolen and the rich ones where it is laundered and invested. Watch the crooks at work and at play, and meet their respectable, white-collar enablers. Learn how the new system works and begin to see how we can tackle it.

## **Money Matters**

A guide to investing in heaven and being “rich toward God” Christians often hesitate to talk about money in spiritual contexts, but in the gospels Jesus talks more about money than about “religious” topics like prayer and heaven. Money Matters advocates following Jesus’s lead in engaging with matters of economy and finance in a faith-driven way, in both our individual and our corporate lives. The authors draw on their contrasting life experiences to offer a well-rounded look at money in the twenty-first century. Paul Stevens, who grew up well-off in Canada and worked as a carpenter, a banker, and later a pastor and professor of theology, finds a complementary voice in Clive Lim, who grew up without money in Singapore, and now works there as an entrepreneur and head of a family investment firm. With frequent scriptural references, Stevens and Lim offer insight into navigating the economic systems of today, aiming to help individuals, churches, and societies become faithful stewards who store up “treasures in heaven” by investing in the kingdom of God. Money Matters is a comprehensive yet accessible guide to integrating one’s faith with one’s approach to money. Just as the Bible variously treats money as a blessing, a sacrament, and a problem, so do Stevens and Lim approach this matter judiciously—avoiding the prosperity gospel on one side and the demonization of material wealth on the other. Capitalism is treated as what it is: a system that has created widespread opportunity and relieved poverty for millions while also exacerbating the gap between the haves and the have-nots. The authors’ wisdom is at turns theological, historical, and practical—and always focused on what it means to live with faithful integrity in our contemporary global economy.

## **JK Lasser's New Rules for Estate and Tax Planning**

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.

## **Orchestrate Your Legacy**

When it comes to legacy planning, you have two choices: 1. The default plan the government currently has in place for you 2. The Plan you design Orchestrate Your Legacy will show you how a fine-tuned team of professionals can give you the clarity to:

- Reduce your income and estate taxes
- Safeguard and control your assets now and into the future
- Protect your family, business and heirs for generations to come
- Pass on your values and vision to your surviving family

This book is a comprehensive resource to understand the key financial strategies and how the components work together to secure your future wealth and lifestyle.

## **The Financial Times Guide to Inheritance Tax, Probate and Estate Planning**

Nearly 9.5 million households in Britain will have to pay inheritance tax. What’s the best way to avoid it? If you’re administering an estate because someone has died, how do you obtain probate? Is it ever possible to retrospectively minimize an estate’s tax liabilities? The Financial Times Guide to Inheritance Tax, Probate and Estate Planning will help you navigate the complicated maze of inheritance tax, probate, and estate planning. Amanda Fisher tells you what to do when someone dies, helps you deal with administrative affairs and distribute the estate to beneficiaries, offers long-term s.

## **The Living Trust Advisor**

A comprehensive guide to living trusts, with expert financial and legal guidance The Living Trust Advisor is an expert guide for both advisors and their clients on the complex process of establishing, living with, and maintaining a living trust. Written by renowned family inheritance attorney Jeffrey L. Condon, this book discusses the various aspects of this important document, and shows you how to manage a seamless transfer of assets to various beneficiaries. This new second edition has been fully updated and revised to reflect the extensive changes to the Estate Tax Law that have taken place since the initial publication, giving you the most up-to-date information and guidance on preserving your wealth and helping your heirs avoid estate tax liability. You'll develop a vision for your trust before you ever meet with an attorney or other key players, and learn how to establish and maintain a trust that remains rock-solid for your lifetime and beyond. As the living trust has replaced the will as the primary means of settling after-death estates, clear guidance and current legal information is of utmost importance for advisors and clients alike. This book is a valuable resource for every stage of planning and execution, helping you ensure that you provide for your beneficiaries the way you intend. Know what to think about before your first meeting with a lawyer Establish and manage your living trust to carry out your wishes Identify potential inheritance problems and build solutions into the trust Distribute assets to future generations, and protect them after the transfer Dealing with complex financial and legal issues while facing our own mortality is a difficult task, but making these decisions is critical to the future outcome of your estate. The Living Trust Advisor expertly guides you through the process so you can be confident that your wishes will be carried out.

## **Protect and Enhance Your Estate: Definitive Strategies for Estate and Wealth Planning 3/E**

“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

## **JK Lasser's New Rules for Estate and Tax Planning**

“Comprehensive guide to estate planning with a focus on the new legislation which impacts trusts, inheritances and the estate tax, which is likely to be repealed gradually over the next decade”--

## **Asset Protection Planning Guide**

Book Description Unlock the secrets to a secure financial legacy and ensure your family's future prosperity with “Wealth Transfer Strategies: Securing Your Family's Future.” In this comprehensive guide, estate planning expert Joe Thomas provides invaluable insights, practical advice, and actionable strategies to help you navigate the complex world of wealth transfer. Estate planning is not just about passing on your assets; it's about preserving your values, protecting your loved ones, and leaving a lasting legacy. With Joe Thomas as your trusted guide, you'll embark on a journey that empowers you to make informed decisions, minimize tax burdens, and safeguard your family's financial well-being. Inside this Book, You'll Discover: The Importance of Wealth Transfer: Explore why estate planning is a vital component of responsible wealth management and how it impacts your family's future. Comprehensive Estate Planning: Learn how to create a well-rounded estate plan that includes wills, trusts, powers of attorney, and healthcare directives. Tax Efficiency Strategies: Discover effective ways to minimize estate and inheritance taxes, ensuring that more of your wealth stays in the hands of your loved ones. Legacy Preservation: Explore the art of legacy planning, from communicating your values to fostering family unity and supporting philanthropic causes. Adaptation

and Responsibility: Embrace the dynamic nature of estate planning, staying current with ever-changing laws and regulations. Professional Guidance: Understand the pivotal roles of estate planning attorneys, financial advisors, and tax professionals in crafting a successful estate plan. Sample Documents: Access sample wills, trusts, and other estate planning documents to serve as references when creating your own customized plan. Glossary of Terms: Navigate the world of estate planning with ease using our comprehensive glossary of key terms. Legacy Preservation: Explore the art of legacy planning, from communicating your values to fostering family unity and supporting philanthropic causes. Adaptation and Responsibility: Embrace the dynamic nature of estate planning, staying current with ever-changing laws and regulations. Professional Guidance: Understand the pivotal roles of estate planning attorneys, financial advisors, and tax professionals in crafting a successful estate plan. Sample Documents: Access sample wills, trusts, and other estate planning documents to serve as references when creating your own customized plan. Glossary of Terms: Navigate the world of estate planning with ease using our comprehensive glossary of key terms. Whether you're starting your estate planning journey or seeking to enhance your existing plan, *"Wealth Transfer Strategies"* equips you with the knowledge and tools needed to secure your family's financial future. Joe Thomas's expertise and guidance will empower you to make informed decisions, protect your legacy, and leave a lasting impact for generations to come. Begin your journey toward financial security and legacy preservation today. *"Wealth Transfer Strategies: Securing Your Family's Future"* is your roadmap to a prosperous and enduring legacy. This book description highlights the key themes, benefits, and content covered in *"Wealth Transfer Strategies: Securing Your Family's Future,"* offering readers a glimpse into the valuable insights and guidance provided by Joe Thomas in the book.

## **Wealth Transfer Strategies**

As the amount of intergenerational wealth transfer continues to increase rapidly, so does the importance of all forms of succession planning. In the SME space, appropriately crafted business succession plans are particularly critical. *The Five Foundations of Business Succession* is a comprehensive reference source for any adviser wanting to deliver client focused solutions in the area. A unique and generous use of diagrams combined with practical tips and example clauses help to ensure the book is user friendly. The book also has comprehensive references to legislation and related materials to address all fundamental aspects of the business succession process. Specific topics addressed include: 1. all relevant tax issues that arise; 2. front end business succession arrangements using insurance; 3. structuring of policy ownership; 4. structuring of contractual arrangements; and 5. regulating uninsurable exit events.

## **Tax Planning Through Trusts and Wills**

The complete guide for managing the financial, legal, and emotional issues of inheritances large and small. A death in the family is never easy, but receiving an inheritance, whether expected or not, can leave heirs feeling overwhelmed and even guilty at this change in their fortunes. Ann Perry's insightful examination of the challenges make managing a bequest a little easier. Combining her practical know-how as a personal finance writer, the expertise of financial advisors, attorneys, and psychologists, and the wisdom gained from her personal inheritance experience, Perry deftly deals with such touchy subjects as selling the family homestead, divvying up property in "blended families," parceling out heirlooms, dividing a family business, and sharing—or not sharing—an inheritance with a spouse. With refreshing candor, Perry addresses the guilt, grief, and unrealistic fantasies that can keep heirs from making the most of their windfalls, and also explores the unique, even life-changing, opportunities that a bequest can present. An excellent tool for estate planning, as well, this is essential reading for those who are writing their wills as well as those who are remembered in one.

## **The Five Foundations of Business Succession**

Estate planning is different when a family business is involved... very different. This practical and expertly-crafted guide assists families to successfully pass their wisdom and wealth from generation to generation.



## **The Wise Inheritor**

Is generational wealth possible for my family? How do I avoid probate? How do I establish a trust? Is there another estate planning tool better suited for me? How do I ensure orderly succession of my business interests? When should I begin estate planning? What professionals and advisors should I rely on? These and other complicated questions and issues arise when estate planning is considered. It can all be overwhelming. And, in today's age of social media "influencers" and "wealth gurus"

## **Legacy: A Guide to Successfully Transferring Wealth from One Generation to the Next**

Will your great-great-grandchildren know your name? Will they know your story, your beliefs, and the principles you hold dear? Research has shown that 90 percent of inherited wealth disappears by the third generation. And if the money you leave behind never reaches your grandchildren, chances are your values will be lost to them as well. But Justin Biance has developed a practical plan that will help you safeguard your history, beliefs, and cherished principles along with your financial assets for many generations to come. Based on Justin's experience with hundreds of retirees and their families, *The Great Inheritance* features deeply personal stories that illustrate what's possible for your family. It provides the wisdom and guidance to help you unite your loved ones, clarify a shared family vision, and create a lasting legacy. Whether your estate is worth thousands or millions, if you would like your children's children to inherit who you are along with what you have, this book is the perfect guide.

## **The Legacy Blueprint**

Will your great-great-grandchildren know your name? Will they know your story, your beliefs, and the principles you hold dear? Research has shown that 90 percent of inherited wealth disappears by the third generation. And if the money you leave behind never reaches your grandchildren, chances are your values will be lost to them as well. But Justin Biance has developed a practical plan that will help you safeguard your history, beliefs, and cherished principles along with your financial assets for many generations to come. Based on Justin's experience with hundreds of retirees and their families, *The Great Inheritance* features deeply personal stories that illustrate what's possible for your family. It provides the wisdom and guidance to help you unite your loved ones, clarify a shared family vision, and create a lasting legacy. Whether your estate is worth thousands or millions, if you would like your children's children to inherit who you are along with what you have, this book is the perfect guide.

## **The Great Inheritance**

*Get Your Financial Ducks in a Row* is informative estate planning 101, with a touch of humor that makes advanced estate planning techniques easy to understand. Mr. Gentry shares over thirty years of experience as an Estate Planner. Many of his actual case studies are outlined in each chapter that illustrates the most common problems individuals and families face today. He provides some of the best solutions to help solve current problems and how to avoid them in the first place. Whether you have a modest estate or an estate facing estate tax liability, Mr. Gentry will share ideas to keep you in control. He will give you the tools to decide who will best control your estate in case of incapacitation, all while increasing estate size and reducing tax liability. After reading *Get Your Financial Ducks in a Row*, you will want to stop procrastinating and call a family meeting.

## **The Great Inheritance**

Straightforward and jargon-free, this book offers tested advice for everyone who must negotiate an inheritance. Because inheriting can be one of the most sensitive family matters, heirs will turn to Rottenberg's reassuring, dependable guidance to help them deal with the difficulties, decisions, and opportunities that

arise.

## **The Adviser's Guide to Family Business Succession Planning**

Putting money in its place -- Trusting others -- Family wealth secrets -- Knowing yourself -- Saying it directly -- Helping love conquer all -- Confronting issues of fairness and equality -- Engaging in your community -- Taking the long view -- Chasing the dream -- Conclusion -- Notes -- Index

## **Estate & Business Succession Planning**

Want to leave an inheritance? Expect to get one? The affluent Baby Boomers are leaving record amounts to their children. But leaving your loved ones an inheritance, and getting one, is not as simple as it seems. Clear financial planning is a wise path, as is careful preparation so the inheritance is managed properly. This book guides you through the journey to ensure your loved ones know about inheritances and how to put them to the best use.

## **Get Your Financial Ducks in a Row**

As owning and operating a small business is a very personal thing as well as being a profession, it is important that people get the right advice in an appropriate way when dealing with the issues involved in passing on their life's work. Should these successions be handled poorly this can create both major personal issues as well as greater issues for the wider economy as a whole. This book deals with the tax implications of a range of different succession plans, but more importantly deals with them in a sympathetic fashion, ensuring that other considerations are not left out of the process unduly.

## **The Inheritors Handbook**

Philosophy on the creation of wealth through inheritance or giving. Brief discussion of the treatment of inheritance taxation in the theory of public finance and the implication for tax policy considered.

## **Preparing Your Family to Manage Wealth**

Examines the financial and personal issues facing those receiving an inheritance, discussing wills, trust options, communicating with financial advisers, and managing wealth wisely

## **The Wise Inheritor's Guide to Freedom from Wealth**

Strategy for the Wealthy Family

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