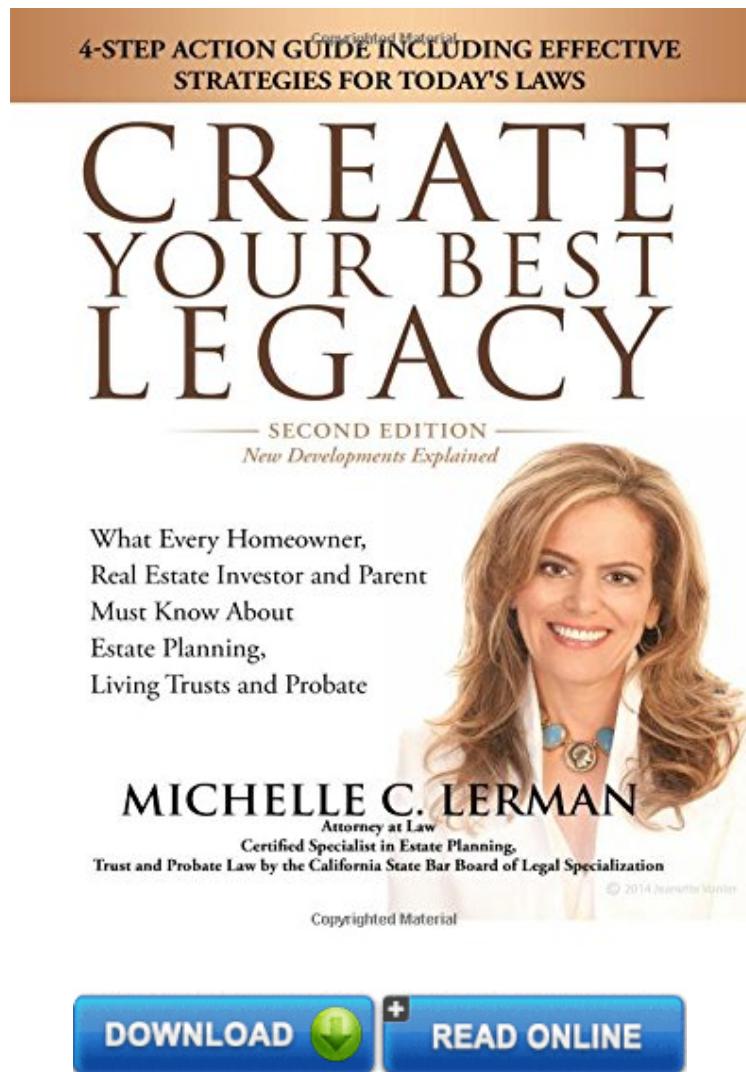


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CREATE YOUR BEST LEGACY: What Every Homeowner, Real Estate Investor and Parent Must Know About Estate Planning, Living Trusts and Probate: 4-Step ... for Today's Laws "2017 Second Edition"

Michelle C. Lerman

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This 2017 Second Edition is a 4-Step Action Guide that explains estate planning, probate, trusts and current laws in an entertaining style that's easy to understand...even if you have no financial background. Read this book and you will learn:How you could save up to tens of thousands of dollars on legal fees Why virtually everybody, regardless of net worth, needs a good estate plan Why recent changes in the law require you to re-think (and perhaps revise) your estate plan When you need a Living Trust... and when it's a waste of money Whether you need a lawyer and when you can do it yourself What you must ask before hiring an attorney PLUS: Free resources for California residents and what they must know to avoid property tax increases at death This one-of-kind action guide is divided into four main sections, or steps, each answering a critical question in the estate planning process:Step #1: Do I need an estate plan? Step #2: What can my estate plan do for me? Step #3: What do I need to know to get the right estate plan? Step #4: How do I get my plan done? To get a full picture of the estate planning process, read each step from start to finish. If one of the questions above is of particular interest, then find that step number in the table of contents and read that section to get your questions answered. For a short answer to each question, turn directly to the end of the section and review the TAKE AWAY, an easy-to-read summary of the most critical information for each step in the estate planning process. If you learn best through stories, then peruse the vignettes within each step to learn from the experience of others. Each vignette is labeled and shown in italics in the table of contents. The Life Lessons, highlighted in grey throughout the guide, give further flavor to the teachings within a sectionwords of wisdom you might not find in a typical estate planning book. For an overview and simple explanation of key words, refer to the Glossary at the end of the book. You wont find legalese. You will find clear explanations of estate planning terms that you will want to know, making it easier to read the guide. For visual learners, the book offers diagrams of the three types of Living Trusts discussed in this guide, a chart discussing the pros and cons of specific lifetime gifting opportunities, a sample death beneficiary designation and an estate plan review checklist. Whether you decide to read this 4-Step Guide from page 1 to the end, or to look at the table of contents to determine which topics will be most helpful, you will find what you need to CREATE YOUR BEST LEGACY. PRAISE BY PROFESSIONALS Creating the right estate plan is the most important and basic part of any financial plan. For anyone who has assets and people they care about, this book is a must read. --Rob Black, host of Rob Black Your Money on KRON 4 TV and 1220 AM Radio San Francisco (www.robblack.com) ... This is a great reference book for anybody interested in this topic, whether youre a layperson or a wealth planning professional. --William Bronchick, best-selling author, attorney, and host of www.legalwiz.com Create Your Best Legacy is filled with insightful words of wisdom, practical advice and easy solutions to avoid disputes before they begin.Michelle truly is an attorney with heart. --Stephen H. Sulmeyer, J.D., Ph.D., attorney, mediator (www.stevesulmeyer.com)

About the AuthorMichelles clients think of her as the attorney with a heart. Chosen again as a 2017 Super Lawyer, her colleagues think of her as a mentor and leader in the estate planning legal community. A frequent guest on radio and TV, Attorney Michelle C. Lerman is certified by the California State Bar Board of Legal Specialization as a Legal Specialist in Estate Planning, Trust and Probate Law. She represents clients throughout California, creating custom estate plans for the unique needs of individuals and families. She also handles estates in Probate Court and assists in the administration of trusts after a death. Michelle obtained her Degree of Bachelor of Arts magna cum laude from the University of California at Los Angeles in 1980 and her Degree of Juris Doctor from the University of Southern California in 1983. She co-founded Lerman Law Partners LLP with her husband of 35 years, Jeffrey H. Lerman, Past President of the Marin County Bar Association. In addition to Probate, Trust Administration and Estate Planning, Lerman Law Partners LLP, known as the Real Estate Investors LawyersSM, assists clients with real estate

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