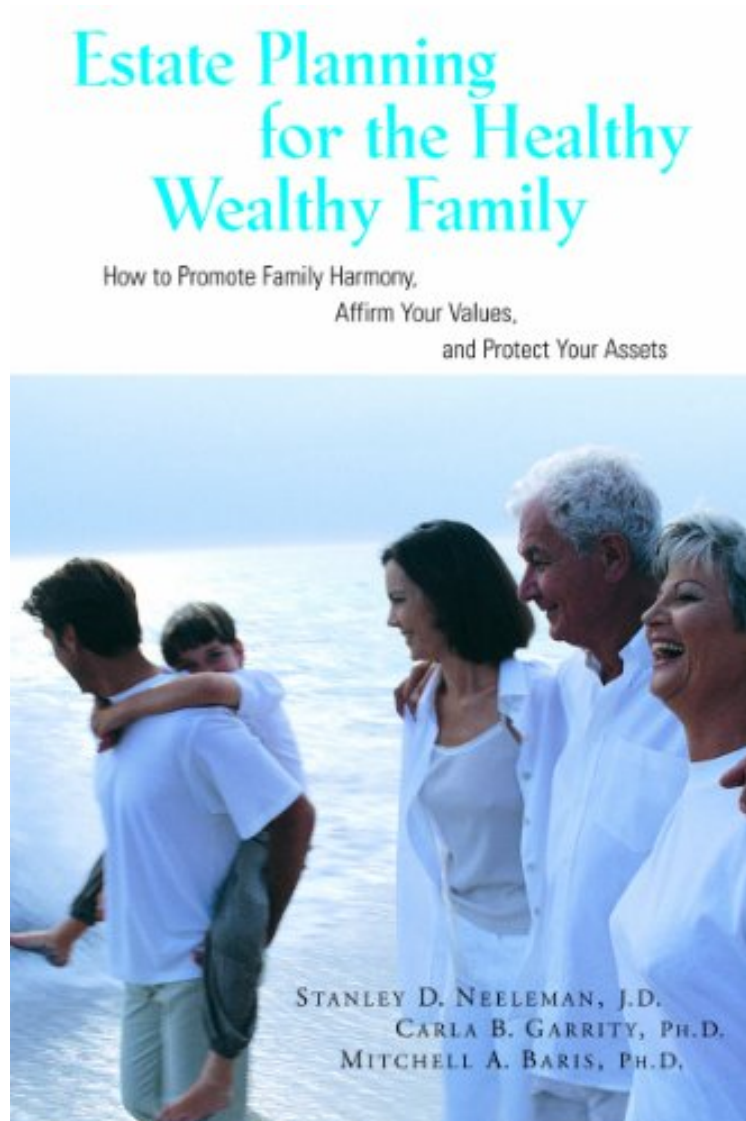


[Library ebook] Estate Planning for the Healthy, Wealthy Family: How to Promote Family Harmony, Affirm Your Values, and Protect Your Assets

## Estate Planning for the Healthy, Wealthy Family: How to Promote Family Harmony, Affirm Your Values, and Protect Your Assets

*Carla Garrity, Mitchell Baris, Stanley Neeleman*  
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**Carla Garrity, Mitchell Baris, Stanley Neeleman : Estate Planning for the Healthy, Wealthy Family: How to Promote Family Harmony, Affirm Your Values, and Protect Your Assets** before purchasing it in order to gage whether or not it would be worth my time, and all praised Estate Planning for the Healthy, Wealthy Family: How to Promote Family Harmony, Affirm Your Values, and Protect Your Assets:

0 of 0 people found the following review helpful. Five StarsBy F. K. TomlinsonGood buy here on . Would buy again.0 of 0 people found the following review helpful. Very informative.By Rose WGreat Book. Easy to understand.5 of 5 people found the following review helpful. Delves way beyond the usual 'protect your assets' focusBy Midwest Book ReviewThere are plenty of books on financial planning and savvy: what makes Stanley D. Neeleman, et.al.'s Estate Planning For The Healthy Wealthy Family special is its focus on values-based estate planning which goes beyond the usual focus on how to pass wealth tax-free to future generations. The concern here is that money passed on be used wisely: a new form of values-based planning which encourages wisdom, character growth, and even non-material values. Professor Neeleman has studied law at Brigham Young University and has extensive practical experience in tax planning, while associate co-author Carla B. Garrity Ph.D is a child psychologist and Mitchell A. Baris, Ph.D. is a family psychologist. The unusual blend of disciplines means Estate Planning For The Healthy Wealthy Family delves way beyond the usual 'protect your assets' focus.

Filled with real-life case examples, Estate Planning for the Healthy, Wealthy Family combines a positive attitude, deep psychological insight, and hard financial know-how for passing on money between family members while keeping relationships and values intact. With competence and empathy, the authors discuss such important moral issues as the role money plays in a happy family; how parents model their childrens values; and ways to build happy families where there is unequal wealth.

From the Publisher"Estate Planning from the Heart" New Book Combines Financial Savvy with Family Values and Wisdom Ron Smith had left his grandson a generous amount of money. Yet when time came for the young man to claim his legacy, he found that it was locked into a trust. The grandson fumed. After all, wasnt his grandfather trying to "rule him from the grave"? Authors Neeleman, Garrity, and Mitchell dont agree. According to their new book "Estate Planning for the Healthy Wealthy Family," the grandfather was practicing value-based estate-planningtaking into consideration his grandsons youthful sense of entitlement and passing on his own, respectful attitude toward money with his legacy. Stan Neeleman is an experienced estate planning attorney with a J.D. from the University of Denver, while Carla Garrity and Mitchell Baris hold a Ph.D. in child psychology and family psychology. In "Estate Planning for the Healthy Wealthy Family," the multi-disciplinary team reveals how to develop estate plans that perpetuate non-material values such as the parents wisdom and character strengths. Topics include \* How to become aware of the money myths and attitudes that guide our financial behavior \* Teaching your child a healthy attitude toward money and spending \* Identifying and addressing emotionally charged money issues in your family \* The value-based use of trusts, lifetime gifts, and tax-savings strategies \* How to deal with children with difficulties who may need special planning, e.g. children with a history of gambling, substance abuse, disabilities, emotional disturbance, impulse control problems, etc. Unlike traditional estate planning methods, a value-based approach requires participants to undergo thorough psychological introspection: "Most of us are only vaguely aware of the standards and concerns that compose our own personal value systems," argue the authors. Parents are also encouraged to carefully assess their childrens money attitudes and personalities. Rather than distributing money equally among siblings, the authors suggest that the estate is distributed according to the economic capabilities and character strength of the individual children. "In Estate Planning for the Healthy Wealthy Family," readers will find numerous examples on how to develop value-based solutions, for families of all structures and life-cycles, from married, divorced and single parents to those with previous marriages. Combining a positive attitude, deep psychological insight, and "hard" financial know-how, Estate Planning for the Healthy Wealthy Family is the 21st century guide to meaningful and fair estate planning.From the Inside FlapPraise "Unlike most estate planning primers, which deal only with descriptions of legal and tax matters, this work focuses on the much more critical issue of how one can develop an estate plan that will strengthen one's family and simultaneously provide maximum benefits to ones heirs, taking into account their individual capabilities, personalities, and potentialities." ---Stephen E. Martin, Martin and Eskelson P.L.L.C. Path Regent of American College of Trust and Estate Counsel "Highly informative and thought-provoking. This important book is an enlightening reminder that there is far more to financial and estate planning than tax-reduction and asset-preservation. The emphasis in this book on using money to support ones core values is a powerful message for all readers, not just the wealthy." ---Tom Kelly, Executive Vice President and former General Counsel, JetBlue Airways Corporation "In a world riveted by money and entitlement, in a society under relentless attack by media messages promising salvation through consumption, it is refreshing to read a book that focuses on what really matters - values. If an individual can identify and live by a clear set of value-drivers, his most important life decisions in many areas, from estate planning to marriage, from child-rearing to death or divorce, will be easier to make and sustain. Sharing these values with one's family and living them by example, at work and play, enhances understanding of and commitment to wealth management and estate decisions. Estate planning isnt mysterious, but combined with the values-oriented approach discussed in this book, it can be an enlightening and effective process." ---Diane Gates Wallach, Gates Capital Management, LLC, Denver, ColoradoAbout the AuthorStanley Neeleman is a well-respected estate-planning attorney with more than 20 years of professional practice. He lives in Provo, UT.Carla Garrity and Mitchell Baris are

clinical psychologists specializing in family counseling. They live in Denver and Boulder, CO.