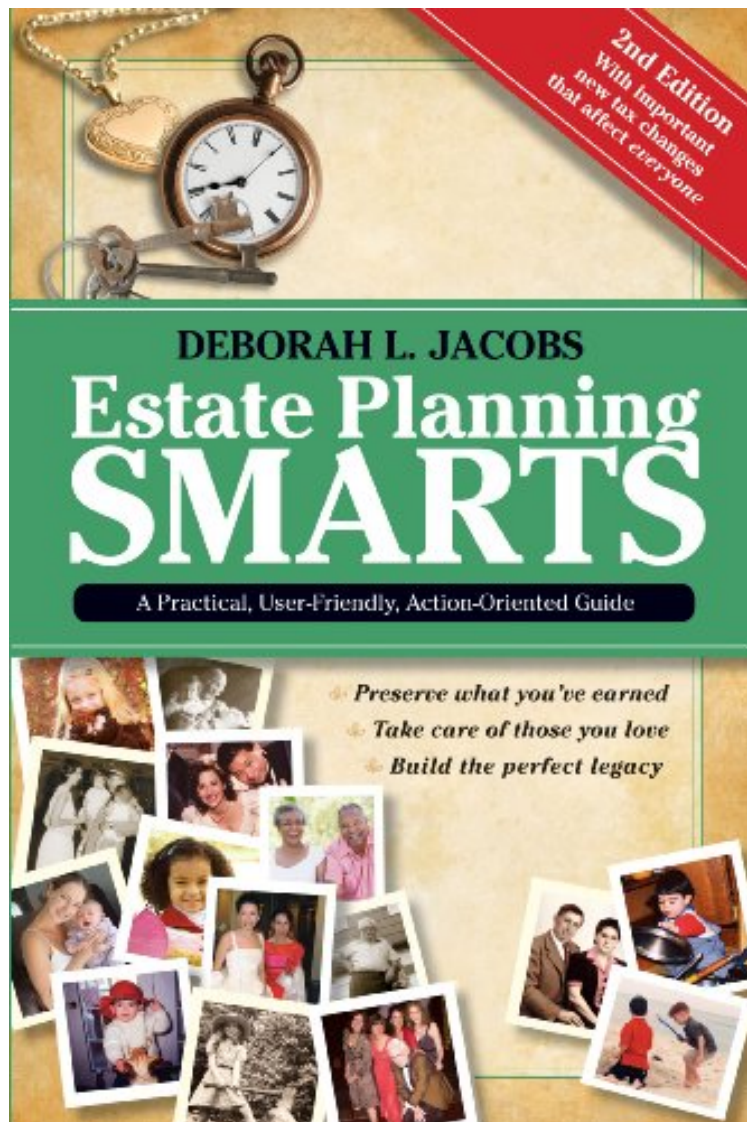


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Estate Planning Smarts: A Practical, User-Friendly, Action-Oriented Guide, 2nd Edition

Deborah L. Jacobs

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Deborah L. Jacobs : Estate Planning Smarts: A Practical, User-Friendly, Action-Oriented Guide, 2nd Edition before purchasing it in order to gauge whether or not it would be worth my time, and all praised Estate Planning Smarts: A Practical, User-Friendly, Action-Oriented Guide, 2nd Edition:

15 of 16 people found the following review helpful. Essential reading for anyone who expects that someday he or she

may dieBy JMOver the years, I have received very conflicting advice from financial planners and attorneys about how best to title assets, name beneficiaries, and structure an estate plan. I bought this book in order to make sense out of the differing and confusing advice I was receiving. What I found was a very easy to read, thorough, logically presented, enjoyable, and action-oriented overview of the importance of estate planning, decision making guidelines for wills and inheritance, the tax system, protecting and providing for partners and children, trusts, retirement accounts, life insurance, health care and education, protecting one's homestead, gifts to family charities, asset protection, and a host of other critical topics that affect us all (regardless of income or assets). Interestingly, I learned that the likely reasons for the differing advice I've received is not that some was necessarily right and some wrong but, rather, that the best way to do things depends on a complex mixture of (differing) state laws, continuous changes in federal tax laws, specific individual circumstances, and even getting the balance right between minimizing tax liability and maximizing asset protection from creditors. The information I learned from this book will now help me to make the best decisions for my particular circumstances by knowing the right questions to ask, by being aware of the complexities involved, and by understanding why it is so important to work closely with an attorney (not just a financial advisor) who is an expert in estate planning in my particular state. Overall, essential reading while we still can!15 of 15 people found the following review helpful. Excellent book!By ShopperThis is an excellent introduction to estate planning and administration. It is pitched at a much higher level than the comparable "dummies" book, yet it remains easily accessible. This book is especially important given all the shifts taking place in estate taxation, developments the author updates deftly on her website. Reading this book now will help you avoid enormous difficulties as well as unnecessary legal expenses later. Highly, highly recommended.10 of 10 people found the following review helpful. Estate Planning SmartsBy Lee ScherThis is an excellent book worthy of anyone in the Financial Services Business to give away to clients. In addition, it is a valuable resource and a wealth of information that has been simplified and a comfortable read to learn about Estate Planning. The author makes sure that this subject matter is in a constant change and instructs the reader how to adapt to changes in the future.Lee ScherFinancial Representative of Guardian Life Insurance Company

A newer edition of this best-selling book for baby boomers and their parents is now available on a different page of Amazon.com. The expanded 3rd edition, published Oct. 31, 2013, replaces the 2nd edition, published in 2011. It covers the important 2012 federal tax changes that affect everyone, and the growing importance of state estate tax and inheritance tax. Other changes since the 2nd edition: the book discusses the Supreme Court decision on same-sex marriage and the Internal Revenue Service ruling implementing it. Plus there are new celebrity case studies that illustrate estate planning strategies and mistakes by James Gandolfini, Adam Yauch and Mark Zuckerberg, among others.

We regularly receive questions from readers about estate planning, a difficult topic at best. For good answers and advice, turn to a new book: Estate Planning Smarts. Written by Deborah L. Jacobs, a lawyer and journalist, it's a terrific guide for people who are just beginning to grapple with estate planning, as well as those who have (or think they have) their affairs in order. Ms. Jacobs does a deft job of handling key topics -- bequests, taxes, trusts, insurance, nest eggs, family businesses and real estate, among others in 19 concise chapters. Her to-do lists are especially valuable. --The Wall Street JournalDeborah Jacobs cuts through the clutter and misinformation that dominates estate planning literature to produce a lucid, extremely readable book. --Larry Reibstein, Executive Editor, ForbesThis is a category killer: a book so good there is no need for anyone else to cover the same material. --Kaye Thomas, Fairmark PressDeborah Jacobs cuts through the clutter and misinformation that dominates estate planning literature to produce a lucid, extremely readable book. --Larry Reibstein, Executive Editor, ForbesThis is a category killer: a book so good there is no need for anyone else to cover the same material. --Kaye Thomas, Fairmark PressAbout the AuthorA lawyer, award-winning journalist and dynamic speaker, Deborah L. Jacobs is a Senior Editor at Forbes. She has also been interviewed as an expert by reporters from many different media outlets, including The New York Times, Bloomberg News, Smart Money, The Motley Fool, Morningstar, Reuters, U.S. News World Report, MarketWatch and CBS TV.