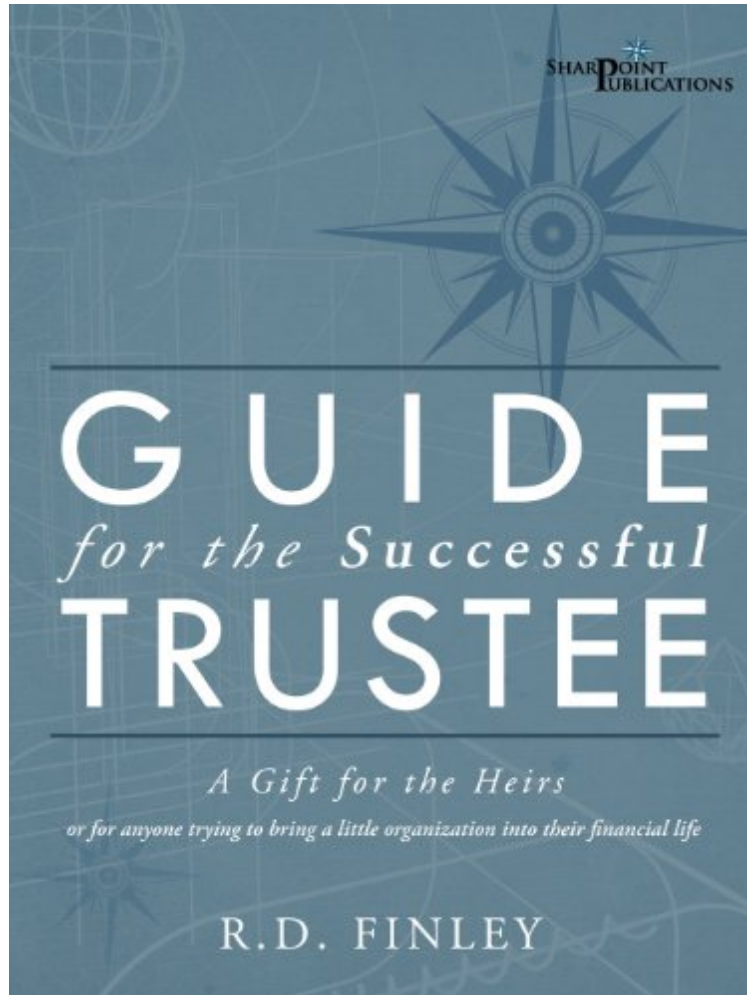


(Free) Guide for the Successful Trustee: A Gift for the Heirs

Guide for the Successful Trustee: A Gift for the Heirs

R. D. Finley

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R. D. Finley : Guide for the Successful Trustee: A Gift for the Heirs before purchasing it in order to gage whether or not it would be worth my time, and all praised Guide for the Successful Trustee: A Gift for the Heirs:

0 of 0 people found the following review helpful. A Rather Limited GuideBy ManyYearsThe title indicates that the book will be of benefit to a trustee, however the first two of three sections of the book is devoted to estate planning and funding, and I found this to be disappointing. A more appropriate title would be "A Cursory Guide for the Trustee". I found the section called "The Successor Trustee Checklist to be a useful, although rather brief. The book contains examples of form letters, which may be useful to some. As is a problem with many Kindle publications, the sample was too brief to be of any benefit. This book, whose author claims many years of experience in the field, is shallow but worth the \$3.95I think that a prospective trustee should skip this book and buy the far superior Nolo Publications books on being a trustee or executor.

WHO SHOULD OWN THE GUIDE? IF you are named on your own, parent's, relative's, friend's or neighbor's estate plan as a trustee, you will need to know your responsibilities and have the system to successfully address the trust placed in you. IF you are establishing an estate plan with an independent third party, bank or corporate trustee, you will want to use the guide's, "Notify-Respond-Verify" system. Make sure they get it correct. IF you are a parent or grandparent, what gift could be more important or useful than a well drafted estate plan and a system to make it work? Give your heirs the tools they can use to make the plan a success. **WHO SHOULD GIVE THE GUIDE?** IF you are an estate planning attorney you realize your clients need a system for transferring and tracking their assets. This is it. The Guide for the Successful Trustee. IF you are an accountant do your clients have their assets properly titled? Use the "Guide" to get the proper registration and use the system to keep it that way. Thousands of dollars in unnecessary taxes and fees are generated by incorrect registrations. IF you are a financial advisor, have your peers and predecessors titled all of their clients' past investments properly? What is your liability to clients on past transactions and current estate plans? Meet with the client and family go over the three phases of estate planning. Illustrate the phases and the differences between the three. "The Guide for the Successful Trustee" has the system to make it simple and successful.