
Estate Planning Is Dead Asset Protection Planning Is Alive And Well A Consumers Guide To Modern Estate Planning

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Estate Planning Current Developments and Hot Topics

The 53rd Annual Philip E Heckerling Institute on Estate Planning was held in Orlando during the week of January 14, 2019 This summary includes observations from that seminar, as well as other observations about various current developments and interesting estate planning issues 1 Summary of Top Developments in 2018 and 2019

By Joan M. Burda, JD

Estate planning means more than having a will or a trust Estate planning is about what you want while you're alive - not just after you're dead Financial Strategies Estate planning issues for lesbian and gay couples By Joan M Burda, JD Jack and Bill have been together for 20 years They live in Florida Bill makes more money

What Is Included in your Estate?

at your death one-half of the value of the asset will be included in your gross estate under IRC Section 2040(b) This principle applies regardless of how the asset was acquired or who paid for the asset in the first place This is also how any vested community property assets will be treated

ETHICS ISSUES FACING TRUST AND ESTATE LAWYERS

Another law firm in town handled the patriarch's estate planning, which has opened up a very lucrative opportunity for you after his death -- because one of the patriarch's children hired you about two weeks ago to represent her in challenging her father's will

What to do when a loved one passes away.

estate planning attorney for guidance Even if you do not hold one of these roles, you liabilities of the estate, as designated in the will (or, if there is no will, by state law) The state law will specify the asset value that qualifies as a "small estate" and requirements for the affidavit

YOUR WILL AND ESTATE PLANNING GUIDE

Remember, the information you enter in this guide is not a substitute for estate planning or a will, but merely a starting point After you have completed the estate planning process, this guide can be a helpful record of insurance contracts and other important information

Texas Probate Passport A guide to probate and estate ...

A guide to probate and estate planning in Texas "Texas Probate Passport" has been prepared to inform the public regarding: (1) what happens legally to the property of a person when he or she dies with a will or without a will (see tab entitled "To Will or Not to Will"); and (2) how

DRAFTING WILL PROVISIONS by MICHAEL E. O'CONNOR, ESQ.

drafting or estate planning B Treat potential problems, not just the present problems For example, if there is another asset for the non-participant family member? Could those in control of the business be delegated to purchase the shares of others over time? 2 If the business is a partnership, what are the terms of the partnership

Estate Recovery Program Handbook

The Estate Recovery Program uses claims in probated estates, affidavits in small sum estates and non-probate assets, and liens to recover the cost of Medicaid, BadgerCare Plus, WCDP, COP, and

PREPARING YOUR PERSONAL/FINANCIAL INFORMATION ...

Property records: Vehicles, real estate and investments Retirement planning documents: Pension benefit statements, Social Security benefits statement and tax-deferred and individual retirement annual statements Keep your financial notebook in a safe place, such as a fireproof box at home that you can quickly grab in an emergency

Heckerling Musings 2019 and Estate Planning Current ...

The 53rd Annual Philip E Heckerling Institute on Estate Planning was held in Orlando during the week of January 14, 2019 This summary includes observations from that seminar , as well as other observations about various current developments and interesting estate planning issues (including the issuance of the Section 199A final regulations)

TEN PESKY PROBATE PROBLEMS

of the estate of a deceased as it existed at time of death does not authorize him to assume possession of property which was not in possession of decedent at time of death and to the possession of which he was not then entitled) If the party is possession does not have a legal right to possession and

Real estate accounting and reporting

3 | Real estate accounting and reporting: The impact of new standards and guidance Retail Revival Once left for dead as on-line merchant sales grow, the retail sector is poised for moderate growth with outperformance expected especially in high-end markets Solid job growth, along with the help of cheap gasoline, are keeping consumers shopping