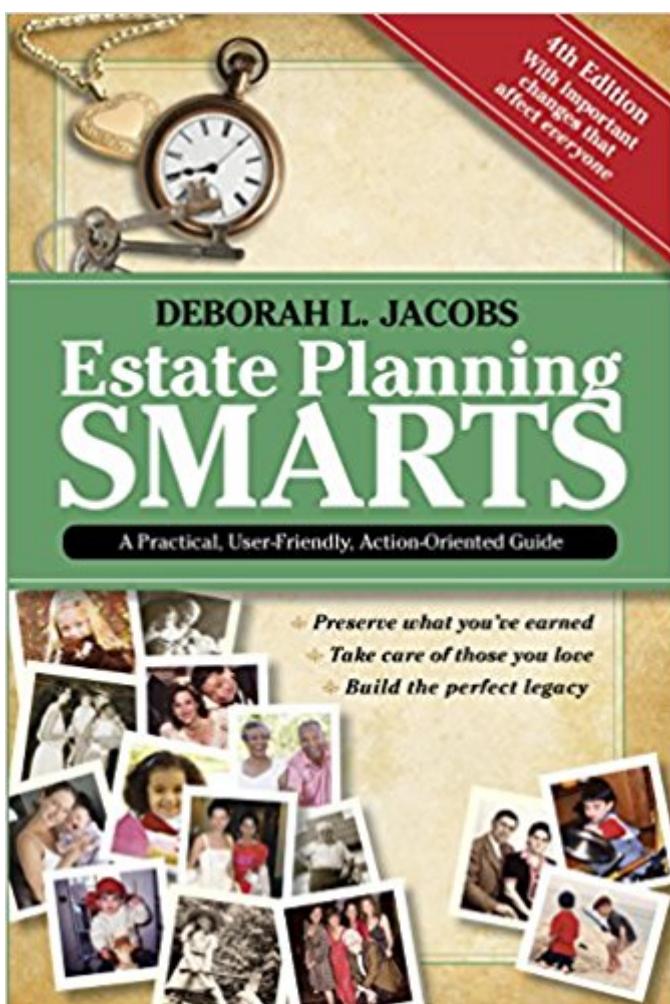


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# Estate Planning Smarts: A Practical, User-Friendly, Action-Oriented Guide, 4th Edition



## **Synopsis**

No one lives forever. So why leave anything to chance? This best-selling book can help you tackle a potentially difficult and very emotional process. In plain English, it explains: When to re-do your will Mistakes people make when trying to avoid probate Rules for IRA inheritors How to hire a lawyer Key documents to protect yourself if you become ill or disabled How to appoint a guardian for children How custodial accounts and 529 plans affect financial aid The fourth edition, which replaces earlier editions, is completely revised to include how income taxes affect estate planning, the pros and cons of credit shelter trusts and the law on planning for same-sex couples. Celebrity case studies illustrate estate planning strategies and mistakes by, among others: Humphrey Bogart, Lauren Bacall, James Gandolfini, Philip Seymour Hoffman, John Updike and Adam Yauch.

## **Book Information**

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## **Customer Reviews**

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 Journal This is a category killer: a book so good there is no need for anyone else to cover the same material. -Kaye Thomas, Fairmark Press The fourth edition of Deborah L. Jacobs recently published *Estate Planning Smarts*, provides a comprehensive look at an array of estate

planning techniques and provides useful tips and explanations for various methods of asset protection. The guide, which is one of the best estate planning books designed for a lay audience, includes discussions about understanding the estate tax system, protecting a spouse, proper care being assured for young and disabled children, protecting assets from creditors, maintaining control of the estate, and many other excellent topics. -Gerry W. Beyer, Wills, Trusts & Estates Prof BlogDeborah Jacobs Estate Planning Smarts, now in a new fourth edition, is the only estate planning book you'll ever need. --Nick Murray InteractiveDeborah L. Jacobs is one of the best, brightest, and as a frequent author of articles in Forbes (where she served as a Senior Editor), The New York Times, and Bloomberg Wealth Manager, one of the most influential of all the journalists who write about Estate Planning for the public. --Steve Leimberg Estate Planning Email Newsletter

Deborah L. Jacobs is a lawyer and award-winning journalist who has written about everything from travel to taxes. In Estate Planning Smarts, now in the fourth edition, she draws on 17 years of writing about the stressful issues that surround estate planning. Her articles for The New York Times, Bloomberg Wealth Manager, Forbes, BusinessWeek and many other publications have been widely cited and circulated by both advisers and consumers. Readers appreciate her clear, concise explanations of complex subjects and her ability to combine real-life stories with reassuring, practical advice. A former senior editor at Forbes and a dynamic speaker, she has also been interviewed as an expert by reporters from many different media outlets, including The New York Times, Bloomberg News, Reuters, U.S. News & World Report, MarketWatch and CBS TV. To keep readers current between editions, Jacobs issues updates that can be downloaded from her book's Web site and tweets @djworking. Her new book, Four Seasons in a Day: Travel, Transitions and Letting Go of the Place We Call Home, confronts mortality in a different way. It chronicles her misadventures after she decided that life is too short, quit an editorial job and planned to Airbnb her way through France. For details, search books by title and author.

This is a really useful book if you are getting ready to meet with a lawyer. It has enough detail but not too much.

A readable and comprehensive book about what can be an overwhelming amount of material. Even complex issues are clearly explained. This is an excellent book for those who are new to the topic and a great refresher for those who have not recently dealt with estate planning issues.

Very informative.

using it

Good

If page tags and underlines are any indication of how useful a book is, then this updated 4th Edition of Estate Planning Smarts has earned its 5 stars from me. Nearly every page is annotated, as I learned about the intricacies of estate planning before doing my first round of it in fall 2016. I really appreciate the easy-to-understand chapters (with glossary) answering all your questions on executors, probate, and building a charitable legacy, among many other things. The author, a lawyer and journalist, also gives you specifics on how to find and interview a good estate lawyer. By learning about the ins and outs of planning BEFORE I met with the lawyer I came prepared to the meeting, knew what to ask, and saved a lot of time (and billing hours).

It was obtained as a gift and I don't know if this provides the intended info.

Author explains things in a very clear and concise manner. Recommended for people learning about estate planning basics as well as a refresher for experienced people.

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