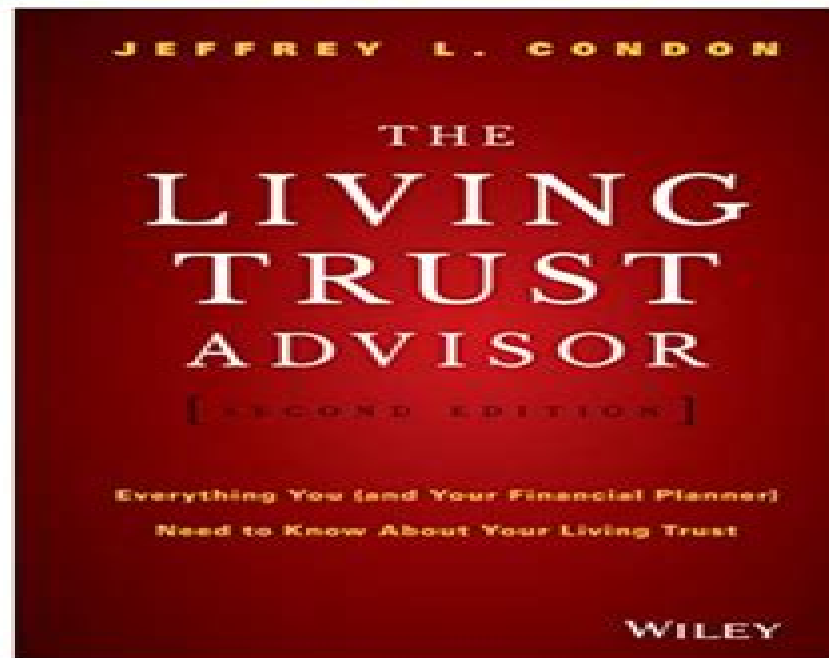


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The Living Trust Advisor Jeffrey L. Condon, 2016-03-25 A comprehensive guide to living trusts with expert financial and legal guidance The Living Trust Advisor is an expert guide for both advisors and their clients on the complex process of establishing living with and maintaining a living trust Written by renowned family inheritance attorney Jeffrey L Condon this book discusses the various aspects of this important document and shows you how to manage a seamless transfer of assets to various beneficiaries This new second edition has been fully updated and revised to reflect the extensive changes to the Estate Tax Law that have taken place since the initial publication giving you the most up to date information and guidance on preserving your wealth and helping your heirs avoid estate tax liability You ll develop a vision for your trust before you ever meet with an attorney or other key players and learn how to establish and maintain a trust that remains rock solid for your lifetime and beyond As the living trust has replaced the will as the primary means of settling after death estates clear guidance and current legal information is of utmost importance for advisors and clients alike This book is a valuable resource for every stage of planning and execution helping you ensure that you provide for your beneficiaries the way you intend Know what to think about before your first meeting with a lawyer Establish and manage your living trust to carry out your wishes Identify potential inheritance problems and build solutions into the trust Distribute assets to future generations and protect them after the transfer Dealing with complex financial and legal issues while facing our own mortality is a difficult task but making these decisions is critical to the future outcome of your estate The Living Trust Advisor expertly guides you through the process so you can be confident that your wishes will be carried out *AARP The Living Trust Advisor* Jeffrey L. Condon, 2011-12-20 AARP Digital Editions offer you practical tips proven solutions and expert guidance Many of us spend a lifetime building wealth and accumulating assets but fail to properly plan how all of this will be passed on once we are gone And while dealing with complex financial issues such as inheritance and estate taxes forces us to face our own mortality making these difficult decisions is something we all need to do Living trust attorney and bestselling author Jeffrey Condon is extremely familiar with these types of situations and understands the importance of a living trust in an increasingly uncertain world Now with The Living Trust Advisor he skillfully discusses the various aspects of this document and details how it can provide a seamless transfer of assets to your spouse children and other beneficiaries after you are gone Written in a straightforward and accessible style and peppered with Condon s trademark humor The Living Trust Advisor puts the living trust in perspective and walks you through the four life phases associated with it Page by page this practical guide will help you Address the numerous issues that should be considered before first meeting with a living trust lawyer and other key players in this arena Establish and manage your living trust over the course of your life as well as prepare it to carry out your financial wishes once you and your spouse have passed on Identify potential inheritance problems now so you can build solutions into your living trust before it s too late Distribute living trust assets to future generations and protect those assets

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