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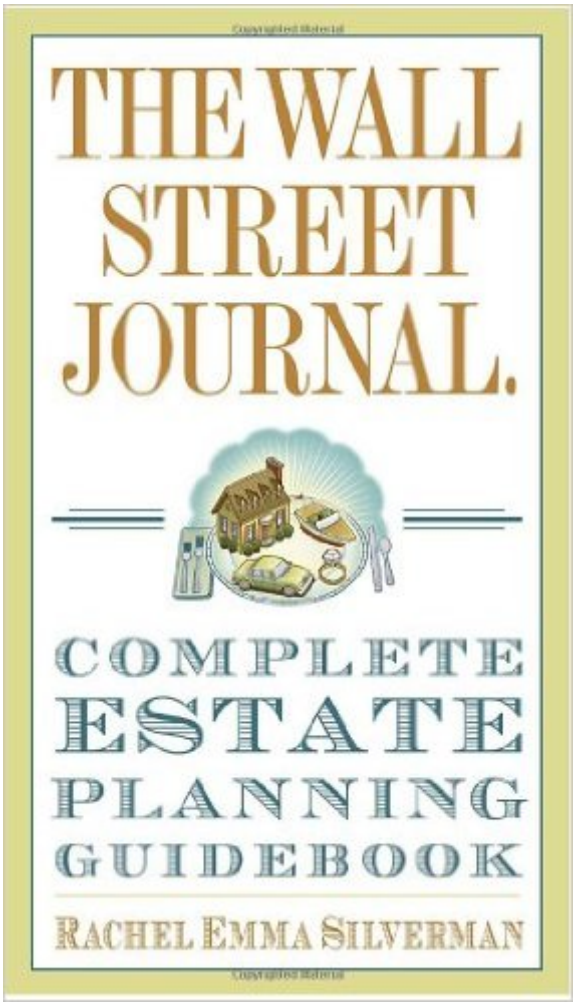
The Wall Street Journal Complete Estate-Planning Guidebook



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Synopsis

Letâ ™s face it: you can’t avoid death or taxes. But you can create an estate plan that will make both a whole lot easier for your loved ones and put you in control of how your assets will get passed to your heirs.Â Â Here, Wall Street Journal personal-finance reporter Rachel Emma Silverman walks you step-by-step through the process. Chock-full of clear and solid advice on how to get the most out of the main estate planning tools - including wills, trusts, life insurance, guardianship papers, and powers-of-attorney documents - the Wall Street Journal Complete Estate-Planning Guidebook will help make your estate-planning process as simple, smooth, and unintimidating as possible. This book will help you:Â Â Â Â Â Â Clarify your estate-planning goals, such as dividing up property for heirs, reducing taxes or leaving money for charity Â Â Â Â Â Â Understand the key estate-planning documents youâ ™ll need, including wills, beneficiary-designation forms, powers-of-attorney and health-care advance directives Â Â Â Â Â Â Decode the technical jargon that estate planners often use, so you feel comfortable discussing QTIPs and QPRTs when you sit down with your lawyer.Â Â Â Â Â Â Â Reduce possible estate, gift or generation-skipping taxes and legal and probate fees â “ decreasing what goes to the tax man and increasing what goes to your heirs Â Â Â Â Â Â Learn strategies to divide money and personal property among your heirs, and reduce the possibility of family fights Â Â Â Â Â Â Discuss sensitive estate-planning issues with your family Â Â Â Â Â Â Maintain your estate-plan over time, including how to store and when to update your documents Â With completely up-to-date information on how to navigate the new 2011 estate tax legislation, and thoughtful advice on how to handle your estate in complicated situations â “ like if youâ ™re single, in a same-sex relationship, or wish to provide for children with special needs - Â this is the estae-planning guide for todayâ ™s messy and complicated world. Â One of the biggest estate planning mistakes people make, says Silverman, is waiting too long to start. Which is why the Wall Street Journal Complete Estate-Planning Guidebook isnâ ™t just for those planning for retirement or their golden years. Itâ ™s for anyone, of any age, who wants the peace of mind of knowing that your wishes will be respected and your hard-earned money will get passed on as you would like.

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Customer Reviews

Yes, I know what many of you are thinking- I'm not rich, so why do I need a Estate Planning guide? Well, you're partly right. Sure, your estate won't have to pay estate taxes, that's only for the wealthy. But without some degree of planning you can make things much more difficult for your loved ones- just at a time when things are bad enough anyway.Take my Dad. Ok, he didn't have a lot of money to leave us. And, he was smart enough to make his bank accounts in trust for us. (This book covers that simple and free trick). He also had a simple will. But he also had a nearly worthless few acres he had bought out in the desert, and he didn't make any special arrangements for it. The hoops and expense we had to go through for that little bit of nearly worthless desert land were astounding.So, my Dad was a smart guy, and well educated with a Master's and so forth. Still, a book like this would have saved at least one big headache.And, I have seen many more families get hit with worse financial headaches and even disasters due to no planning at all. Really- even us middle class folks need some estate planning. Don't put it off. I agree with the author when she says "One of the biggest estate planning mistakes people make is waiting too long to start."This book is comprehensive, fairly easy to understand and up to date. What's nice is that there are sections which are good for those who wouldn't seem to need a "self-help" book- those who have a big enough estate as to bring in a Estate planning attorney. For those few, it covers the legal gobbeldygook that lawyers use, allowing you to have a chance at understanding what your lawyer is saying. And what's nice is that it's reasonable priced too, so there goes your last argument.

This gives you a good overview, but it could use a bit more detail. I suppose that is why we all end up having to hire attorneys. It is, nevertheless, well presented, well organized, and succinct. A good starting point.

I had read numerous articles and other books on estate planning but this book clearly explains the

difference between trusts, types of wills, life insurance and other important considerations when planning and developing an estate plan. The author uses illustrations from her own life experiences and what she learned from them. This book is very readable, straight forward, and highly informative.

The Complete Estate Planning Guidebook is an excellent overview - guide - to the estate planning process. As such it can be a starting point for those who will go into more depth and those who only want to have an general understanding of the issues, alternatives, and processes of estate planning.

This book is brief, clear, organized, and exactly what we were looking for to prep for our first Estate Planning session. If you are looking to do complicated things with taxes, this is probably not the book for you. This is the "Monarch Review Book" of estate planning. The chapters are identified in a way that one only needs to read relevant information, and not overload on irrelevant issues.It is therefore not at all daunting.....

I have a Trust but knew it needed review and I needed to know current information and things I could do so the lawyer cost would be less. It fullfilled all my expections and more. I read it cover to cover on a flight from Kansas to California.

I enjoyed reading this book. It had good information and was written in a pretty simple and straight forward easy to understand manner. The personal examples the author used from her friends experiences were a nice touch also. It seems to be a little more focused on people who are fairly wealthy and providing advice and guidance on how to avoid estate tax pitfalls that most people would never have to worry about. But it does have good general information on a variety of topics. I would recommend it to friends and family.

Nice easy read that give you elementary understanding of the issues. Well organized and quite comprehensive. I would recommend it for anyone that wants the basics.

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