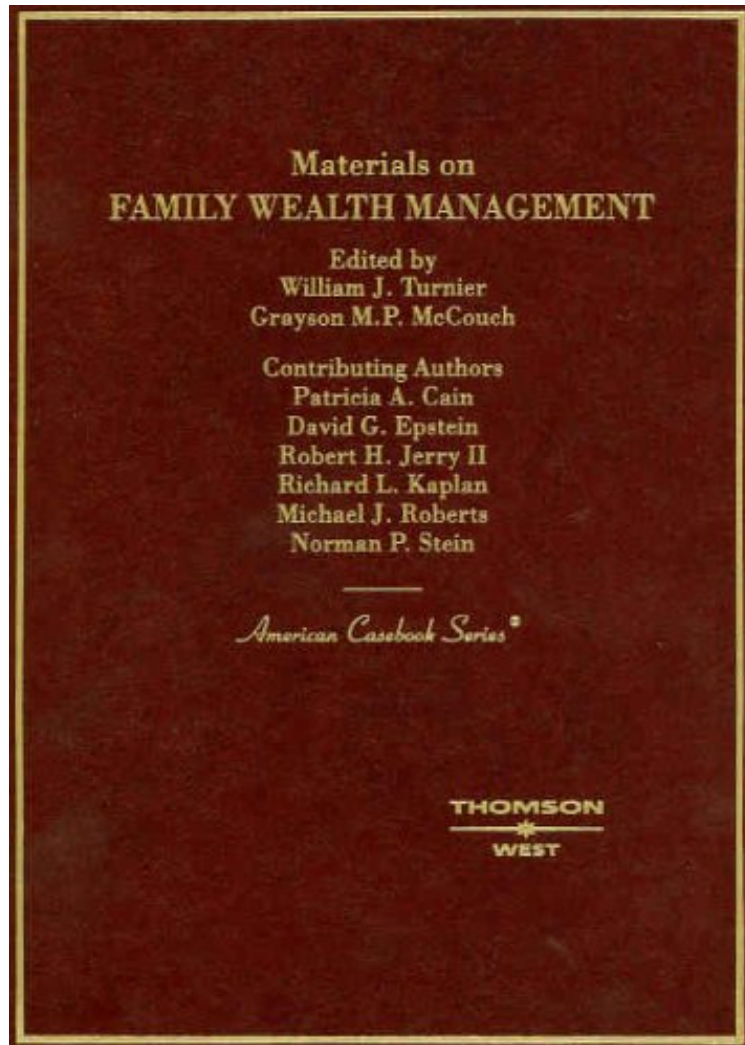


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## Materials on Family Wealth Management (American Casebook Series)

*William Turnier, Grayson McCouch*  
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**William Turnier, Grayson McCouch : Materials on Family Wealth Management (American Casebook Series)** before purchasing it in order to gage whether or not it would be worth my time, and all praised Materials on Family Wealth Management (American Casebook Series):

Most estate planning courses are centered around the estate tax. In the face of the uncertain future of the estate tax, it has become increasingly difficult for teachers to focus class concentration on planning strategies. Moreover, the slated

increases in the estate tax exemption are making conventional approaches to estate planning less relevant to increasing numbers of Americans. Nonetheless, most individuals and families of moderate to substantial wealth will still have considerable interest in a variety of wealth-related issues. Attorneys must be prepared to assist their clients in coping with these issues. Moreover, most lawyers will themselves personally have to confront a number of wealth-related issues. The purpose of this book is to provide a teaching tool for a course centered around such issues. Until the publication of this book, there were no published materials available and teachers typically used customized materials. This book consists of ten chapters dedicated to the following wealth-related issues: (1) investment strategies; (2) an overview of income tax issues that impact families and individuals; (3) the law governing the transmission of wealth; (4) the basic structure of estate and gift taxation; (5) home ownership; (6) meeting the cost of higher education; (7) life and disability insurance; (8) planning for retirement; (9) elder law; and (10) economic failure and asset protection. Each chapter has been written by an expert in the area. The chapters have all been written with an emphasis on how economics and the law impact individual and family planning and decision-making in the various areas covered by each chapter. Each chapter has been written so that it stands alone, thereby enabling an adopter to skip portions of the book or reorder assignments as deemed appropriate. The materials are textual and include a substantial number of problems to facilitate classroom use and discussion.