

(Mobile book) Nine Steps to a Complete Estate Plan

Nine Steps to a Complete Estate Plan

Mr Matthew Burgess, Patrick Ellwood, Tara Lucke
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Mr Matthew Burgess, Patrick Ellwood, Tara Lucke : Nine Steps to a Complete Estate Plan before purchasing it in order to gage whether or not it would be worth my time, and all praised Nine Steps to a Complete Estate Plan:

As the amount of intergenerational wealth transfer continues to increase rapidly, so does the importance of all forms of succession and estate planning. Ensuring appropriately crafted estate planning documents are in place is particularly critical. The Nine Steps to a Complete Estate Plan is a comprehensive reference source for any adviser wanting to

deliver client focused solutions in the area. A methodical, plain English drafting approach and a generous use of practical examples help to ensure the book is user friendly. The book also includes references to legislation and related materials to address all fundamental aspects of the estate planning process. Specific topics addressed include: (a) personally owned assets; (b) superannuation; (c) trust assets; (d) interests in companies or partnerships; and (e) all relevant tax issues that arise.

About the Author Matthew Burgess is one of the four directors and founders of specialist firm View Legal. Having the opportunity to help clients achieve their goals is what he is most passionate about. As Matthew always works in conjunction with trusted advisers (whether it be accountants, financial advisers or other lawyers) and their clients, finding ways to fundamentally improve the value received by those advisers, and in turn their clients, has led him to develop numerous game changing models. Examples include providing guaranteed upfront fixed pricing, founding what is widely regarded as Australias first virtual law firm, and more recently, developing a platform that gives advisers access to market leading advice and support for less than \$1 a week. Matthews specialisation in tax, structuring, asset protection, estate and succession planning has seen him recognised by most leading industry associations including the Tax Institute, the Weekly Tax Bulletin and in the 2014 'Best Lawyers' list for trusts and estates. Work is one aspect of his life Matthew loves, so there is no need to be constantly searching for 'balance'. His other great loves are: 1. Family they are profiled in various ways through the series of childrens books he has written under the pseudonym 'Lily Burgess' see www.wordsfromdaddysmouth.com.au and various TV commercials; 2. Learning going cold Turkey on television and most forms of media in late 2005 has radically increased Matthews ability to study the great authors and inspired him to recently publish a book that explores the concept of 'true success' see www.thedreamenabler.com.au 3. Health aside from being a foodie and swimming at least a 5km a week, Matthew installed a stand up workstation in 2007 and among a few other lifestyle choices, it changed his life.