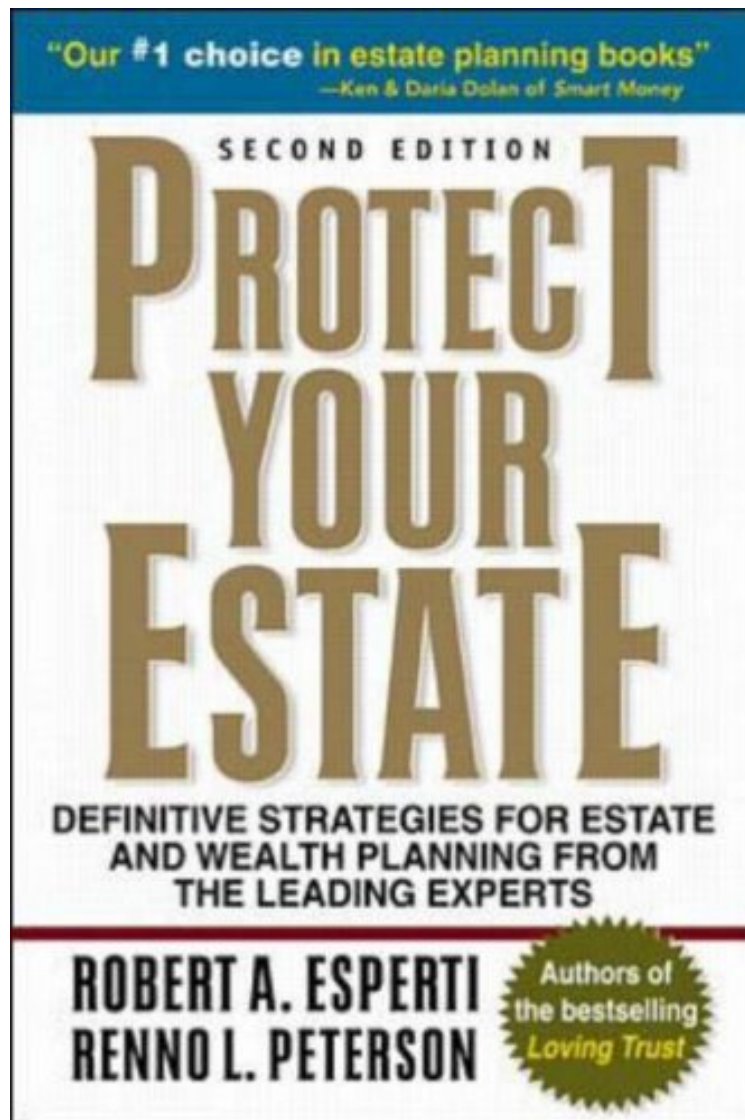


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3 of 3 people found the following review helpful. A nice book on estate planning that made me feel like I was reading

an online blog. By ExecutorCoach.com This book was better than most I've read on estate planning. Its objective was to familiarize the reader with the estate planning process. I'm not sure it really covered "the process." But I think it educates the reader well enough to be an educated consumer when consulting an estate planning attorney for help in estate tax planning matters. As I read I got the feeling the authors were anti-probate and pro-living trusts. And there were certain things included in the book that made it sound like a promotional piece for the authors' own law practices and organizations. I would have liked it better if the book had not come across as a promotional piece. The authors say to treat this book as a survey of what estate planning can be. When reading this book (7 years after it was written) I got the feeling the content could have been a bunch of blog entries the authors have posted online that they conveniently strung together to make a book. There are 42 chapters and 4 "entries" in the appendix. And the book is only 330 pages long. I was looking for a Glossary of Terms, but failed to find one. The book would have been better with one. And I would have liked the book better if Appendix D about the history of estate planning had been moved to the front. Chapter 1: What is estate planning? I felt this chapter was lousy. It was wordy and vague and not really accurate. Estate planning is really "estate tax planning." It is not financial planning or "wealth strategies planning" as the authors suggest. Nor is estate planning to be confused with "disability planning." As a result, I'm not sure why Chapter 4 was included. Chapter 8: Probate. I enjoyed reading about estate administration in this chapter. But I think the authors did the reader a disservice by equating the probate process to estate administration. Other problems I had with this chapter include the statement made that executors work for the probate court or probate judge. This simply is not true! Executors work for the estate (a separate legal entity). And the statement that probate is complicated is not accurate as stated. In some cases it can be. But in most it is NOT. Chapter 9: The federal estate tax. Here the authors repeatedly referred to the estate tax as a death tax. The estate tax has nothing to do with death. It only has to do with wealth transfers. If a poor person dies, then no estate tax is due. If the estate tax were really a death tax, then a tax would be due when a poor person dies. Chapter 10: The unified system. I had a problem with the material the authors chose to talk about here. Why was it necessary to discuss the way things used to be? As far as I am concerned the book would have been much better if the authors had stuck to the present and explained how things are now. The presentation of the material would have been much more straightforward and easy to understand. 4 stars! 17 of 18 people found the following review helpful. Detailed overview in layman's terms By Dan Austin Outstanding book to educate yourself on estate planning. This book will prepare you for the planning process so you can understand what your estate planning attorney is talking about and what he or she is trying to accomplish for you. It also very clearly outlines the fallacies inherent in trying to conduct estate planning without competent legal counsel. The authors tell you how to find competent advice and how to arrange conduct free consultation interviews with any prospective estate planning specialists. If you are even thinking about estate planning, GET THIS BOOK! 16 of 16 people found the following review helpful. Protect Your Estate - by Esperti, et al By A Customer I bought the previous edition of this book several years ago and learned so much from its straight forward, well-organized and clear presentation (I am neither an accountant nor a tax person) that co-workers and family members began quizzing me on matters of estate planning. This book allowed me to answer many questions and also enabled me to have a very intelligent conversation with a professional estate planner. I consider the book such a valuable resource that I just purchased the updated edition.

Estate planning is more important than ever, and it's no longer just for the very rich. Today's "middle-class millionaires" created by the booming stock and real estate markets have more assets than they ever believed possible. That unexpected wealth brings with it new concerns about how to protect their money and their heirs. A best-seller in its first edition, this book shows anyone how to implement estate planning into a long-range financial plan. It includes the latest on: Disability planning Living trusts; asset protection through long-term planning Family limited partnerships Written by two noted tax attorneys who have revolutionized the estate-planning process with their techniques, Protect Your Estate, Second Edition, enables readers to understand the newest changes in the tax laws and turn them to their own advantage.

From the Back Cover "A must read for anyone concerned about protecting their assets and learning important estate planning techniques." Ken and Daria Dolan, WOR Radio Network and CNBC-TV Ignorance of new tax laws can eat away your estate... Here's how you can protect your money and your heirs. You've worked hard. You've made money in the stock market boom and your real estate has soared in value... Now you have a sizable estate for your heirs. Today, millions of baby boomers don't yet realize that prosperity means their heirs may be vulnerable to taxes that used to apply only to the very rich. The answer is to begin planning now! The authors, two tax attorneys, educators, and consultants, know everything there is to know about keeping your estate intact, protecting your heirs, and ensuring that your wishes for your estate are carried out exactly. This edition of the best-selling Protect Your Estate, has been fully revised and updated to address new laws and improved economic conditions. Did you work a lifetime just to leave large sums to the government? Learn how to turn the new tax laws to your advantage. See how a couple can avoid paying any estate taxes at all on an estate worth as much as \$2 million. Find out how estate planning can be tailored to your unique life situation and personal goals. Best of all, learn how to make sure your money goes exactly

where it should. About the Author Robert A. Esperti and Renno L. Peterson are known internationally for their estate and wealth strategies planning expertise. They live respectively in Jackson Hole, Wyoming, and Sarasota, Florida. They are the founders of the National Network of Estate Planning Attorneys and the Esperti Peterson Institute of Estate and Wealth Strategies Planning, and are the publishers of CONSPECTUS CURRENT, The Journal of the Estate and Wealth Strategies Planning Professions. They are also the senior principals in Esperti Peterson Cahoon, a National Law Firm and Partnership of Professional Corporations, and Esperti Peterson Consulting, Inc., a wealth strategies design firm specializing in serving the planning needs of the world's affluent families. Widely known to the general public and planning practitioners in the multidisciplinary professions of law, accounting, and financial and insurance planning, Esperti and Peterson are the world's most prolific and creative estate planning authors. They are the authors of 23 books, including the best-selling Loving Trust, The Living Trust Revolution: Why America Is Abandoning Wills and Probate, The Living Trust Workbook, and a number of multi-volume professional treatises. Esperti and Peterson are dedicated to meeting the estate and wealth strategies planning needs of affluent client families, and are widely sought for their practice and lecture skills as they impart the depth of their unique knowledge.