



Estate Planning and Drafting (American Casebook Series)

Jeffrey Pennell

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Updated through October 1, 2014, Pennell's revised estate planning book focuses on everyday planning for "middle-rich" clients, such as: traditional planning for couples, family trust planning, portability, life insurance, retirement benefits, charitable giving, and some information on postmortem planning. It explains essential tax fundamentals that inform traditional techniques, without overemphasis on a tax oriented practice. The text contains over 100 pages of annotated forms illustrating basic planning documents, including a pour over will, self-trusteed declaration of trust, and a third party special needs trust.



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