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Private Clients Legal & Tax Planning Answer Book 2016

G. Warren Whitaker, Leiha Macauley, Darren M. Wallace, Natalia Murphy

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Private Clients Legal & Tax Planning Answer Book 2016 provides practical guidance for estate planning for individuals.

The new Q&A resource addresses complex client questions related to the benefit and protection of the client's assets, dispositions to current and future family members, the uses of trusts and other vehicles, and current and future charitable donations.

Authored and edited by G. Warren Whitaker and a team of experts from Day Pitney LLP, this new Answer Book discusses the different ways in which assets can be owned and transferred; best practices in executing wills and trusts; clear guidance on estate, gift and generation-skipping transfer taxes; and answers on retirement accounts, charitable giving, and family and marital issues.

Stockpiled with highlighted practice tips, Private Clients Legal &Tax Planning Answer Book 2016 also provides guidance on issues related to incapacitation, international concerns, and managing the estate planning team (attorneys, accountants, trust officer, etc.)

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