



# **JK Lasser's New Rules for Estate, Retirement, and Tax Planning (J.K. Lasser)**

*Stewart H. Welch, Harold I. Apolinsky, J. Winston Busby*

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**Current, relevant estate, retirement and tax planning strategies with expert insight and advice**

*JK Lasser's New Rules for Estate, Retirement and Tax Planning* is the authoritative guide to estate, retirement and tax planning, fully updated to reflect new changes and legal updates. Written by some of the most recognized experts in the field, this book offers useful planning advice for people of various ages and income levels, including information on retirement planning, trusts, charitable contributions, gifts, life insurance, and wills. In this guide, you'll find up-to-the-minute facts, valuable insight, and solid strategies to help you preserve your wealth and plan your estate under current tax rules. The helpful companion website provides spreadsheets, tools, and additional reading to help you get organized, while the book's expert guidance provides the background information you need to prepare properly.

Estate planning is a complex topic, made even more complex by constantly changing laws. Failing to plan properly can result in your loved ones losing out on much of your hard-earned assets, and researching the topic on your own can be a minefield of assumptions, misunderstandings, and potential legal consequences. *New Rules for Estate, Retirement and Tax Planning* helps you sidestep the confusion, distilling the information down to what's relevant and current. This practical resource covers a wealth of important issues, including:

- Estate planning, taxation, and investing for maximum growth
- The role of wills, executors, and trusts, and how to treat charitable contributions
- Life insurance, retirement planning, Social Security claiming strategies and the do's and don'ts of gifting
- Business planning, including succession, asset protection, and family limited partnerships

You've worked hard your entire life. You managed to accumulate assets. *New Rules for Estate, Retirement and Tax Planning* will help you maximize the transfer of your assets to the people and charities you love rather than the federal government in the form of taxes.

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