

California Medicaid Trust Sample

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this book is a general overview of issues an estate planning advisor may need to address when preparing an estate plan for a family with a special need s child intro

for drafting forms related to business organizations divorce retirement plans bankruptcy employment estate planning commercial transactions real estate financing numerous other general practice areas specialties where appropriate coverage includes the tax consequences to be considered when drafting specific forms

everything you need to know to protect your hard earned assets this one of a kind book covers 30 different types of trusts it shows how to set up a trust to manage assets in the event of disability or death avoid probate secure assets from medicaid and creditors minimize or eliminate estate and other transfer taxes financially protect loved ones and more all within in the confines of the law includes coverage of the new disclaimer credit shelter trust as well as expanded information on gprts grats and gruts martin m shenkman cap mba jd teaneck new jersey is an attorney specializing in estate planning and personal finance he is also the author of the estate planning guide and real estate after tax reform

this law school textbook explores the basic doctrines and planning techniques that modern lawyers must master to assist clients with estate planning draft implementing documents and advise fiduciaries and clients on the proper administration of estates and trusts a hypothetical client family is used to explore the human aspects of estate planning and to illustrate estate planning issues most likely to arise at particular stages of a client's life textual material is designed to be self explanatory so that teachers are free to use classroom time to explore planning and drafting techniques and policy considerations more fully

an estate plan can have several elements a will an assignment of power of attorney a living will or healthcare proxy and in some cases a trust as an estate planner you must be mindful of both federal and state laws governing estates when assembling plans for clients estate planning forms by l rush hunt covers all elements of estate planning in detail with easy to follow time saving forms this book empowers attorneys to establish trusts to reduce estate and gift taxes and to distribute assets to the heirs without the costs delays and publicity of probate court the primary purpose of estate planning forms is to ensure that the greatest amount of the estate passes to the estate owner's intended beneficiaries with the guidance in this book you will be able to offer greater protection of your client's assets from creditors and lawsuits cd rom included includes the following forms letters of engagement privacy notices powers of attorney wills pre and post marital agreements trusts

now you can help your students learn the principles of estate planning by working on the kind of problems clients actually present case studies in estate planning with abridged student forms gives students hands on experience that will prepare them for practice the authors make their book both efficient and effective case studies in every chapter emphasize problems that arise in the estate planning process the principles of estate planning are first introduced then demonstrated through short exercises and simulated client situations exercises and case studies explore a broad variety of issues for great flexibility in teaching each chapter begins with an overview then moves to more detailed discussion of legal doctrines and principles an electronic forms supplement on cd supports a drafting component to the course the book progresses from fundamental to more sophisticated topics organization presents a life cycle progression reflecting the changing needs of clients from youth through old age coverage of federal tax issues can be omitted at the professor's discretion end of chapter bibliographies provide extensive reference sources can be used with a variety of other material to capture student attention the book presents high interest materials such as client conflicts of interest in diverse circumstances medical care directives organ and tissue donations and final arrangement instructions marital agreements transfer on death deeds asset protection techniques section 529 plans and other educational savings gift structures tax planning for retirement assets spend some time examining this new casebook and see for yourself how skillfully the authors help you lead students to enlightenment

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