



# Estate Planning Made Easy, Third Edition

*David T. Phillips, Bill S. Wolfkiel*

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**Estate Planning Made Easy, Third Edition** David T. Phillips, Bill S. Wolfkiel

Baby boomers heading into their retirement years *must* take the time to ensure that their estates are in order—and that means a lot more than just preparing a will and naming an executor. Insurance, taxes, and planning for Medicare and Medicaid are among the crucial considerations in planning for the future.

Completely revised and updated, *Estate Planning Made Easy, Third Edition* shows individuals why they need more than just a will and an executor, options for conserving wealth, and advice on putting together a comprehensive estate plan. This third edition includes extensive revisions to tax legislation, which has changed significantly over the last few years, leaving most American's clueless.

## **Features:**

- \* Changes to Tax Legislation
- \* How seniors can best plan for Medicare and Medicaid
- \* How to obtain the best cash flow with an equity-rich home
- \* Tax legislation regarding 401k's IRA's, and pensions
- \* Strategies to help reduce estate size and give to children, grandchildren, and great grandchildren, without jeopardizing annual gift allowances
- \* Premium financing of life insurance
- \* Information on social security, private annuities, and state inheritance tax

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