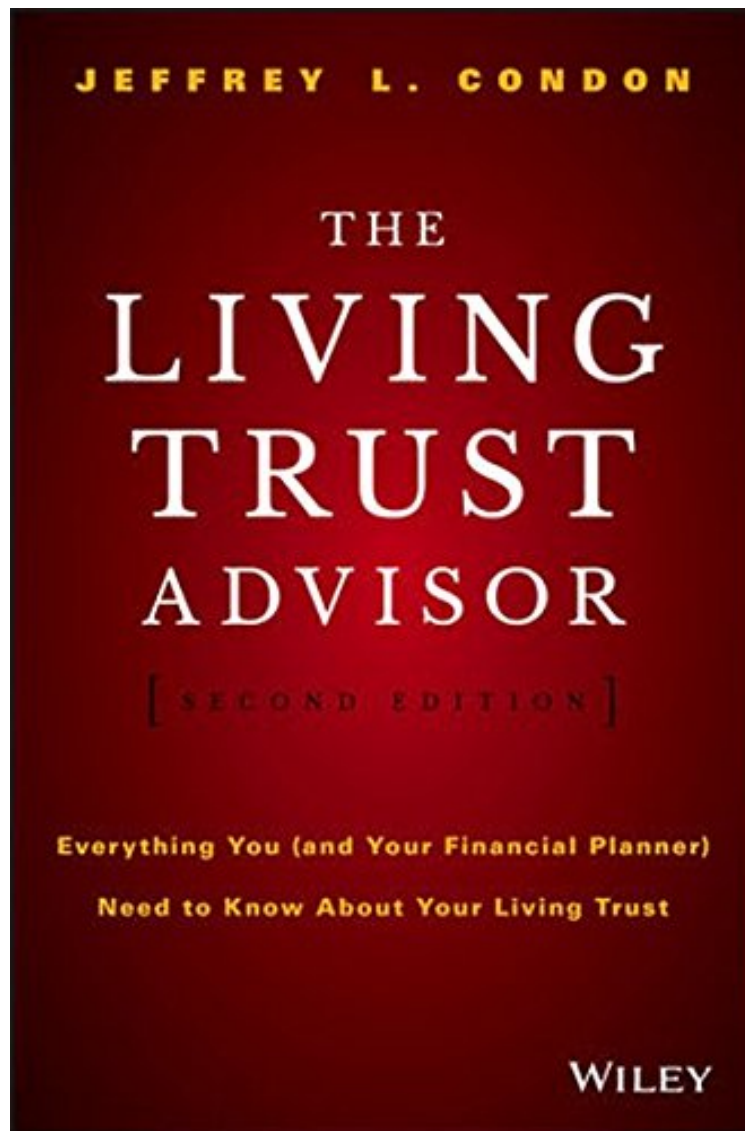


(Download pdf ebook) The Living Trust Advisor: Everything You (and Your Financial Planner) Need to Know about Your Living Trust

The Living Trust Advisor: Everything You (and Your Financial Planner) Need to Know about Your Living Trust

Jeffrey L. Condon

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Jeffrey L. Condon : The Living Trust Advisor: Everything You (and Your Financial Planner) Need to Know about Your Living Trust before purchasing it in order to gage whether or not it would be worth my time, and all praised The Living Trust Advisor: Everything You (and Your Financial Planner) Need to Know about Your Living Trust:

1 of 2 people found the following review helpful. Look Elsewhere for Comprehensive Advice on Living Trusts
By JimI found this book to be long on words and short on information when compared to the Nolo legal guides, and therefore skeptical of the 5 star reviews. The main content of the book seemed to be anecdotes on how people become deviously clever and horribly selfish over assets that were never theirs in the first place, while the lessons provided in these anecdotes often seemed to contradict one another. Also, the author took pride in changing some of the legal terminology to make it "easier to understand", but I did not find that the case at all.
1 of 2 people found the following review helpful. Just what we needed
By Linda ThorpeClear, helpful, readable, this book is just what we needed even though we had a living trust. It's so well organized that it can be used as a reference. I will have confidence to assert what I really want the next time I meet with our trust attorney.
0 of 2 people found the following review helpful. VERY INFORMATIVE
By CONFUSEDThe content is well explained and reading the book will make you realize how important a living trust.
I recommended to a friend to read the book and she bought one from .

A comprehensive guide to living trusts, with expert financial and legal guidance
The Living Trust Advisor is an expert guide for both advisors and their clients on the complex process of establishing, living with, and maintaining a living trust. Written by renowned family inheritance attorney Jeffrey L. Condon, this book discusses the various aspects of this important document, and shows you how to manage a seamless transfer of assets to various beneficiaries. This new second edition has been fully updated and revised to reflect the extensive changes to the Estate Tax Law that have taken place since the initial publication, giving you the most up-to-date information and guidance on preserving your wealth and helping your heirs avoid estate tax liability. You'll develop a vision for your trust before you ever meet with an attorney or other key players, and learn how to establish and maintain a trust that remains rock-solid for your lifetime and beyond. As the living trust has replaced the will as the primary means of settling after-death estates, clear guidance and current legal information is of utmost importance for advisors and clients alike. This book is a valuable resource for every stage of planning and execution, helping you ensure that you provide for your beneficiaries the way you intend. Know what to think about before your first meeting with a lawyer
Establish and manage your living trust to carry out your wishes
Identify potential inheritance problems and build solutions into the trust
Distribute assets to future generations, and protect them after the transfer
Dealing with complex financial and legal issues while facing our own mortality is a difficult task, but making these decisions is critical to the future outcome of your estate. The Living Trust Advisor expertly guides you through the process so you can be confident that your wishes will be carried out.

From the Inside Flap
The last great lesson you leave to your family is the inheritance plan you make in your Living Trust. Creating a Living Trust that effectively carries out your inheritance instructions requires more than just printing out "one-size-fits-all" forms, checking off a few boxes, and signing where instructed. You and your financial advisor have to know the real-world impact of the words you inject into the document. Otherwise, your family, and the assets you leave to them, may become victim to the Law of Unintended Consequences. Fully revised and updated to reflect the most recent laws and best practices in the Inheritance Arena, this Second Edition skillfully shows you step-by-step how to create a Living Trust that easily and seamlessly transfers your lifetime of accumulations to your spouse, children, grandchildren, and other beneficiaries. While such a discussion can become a dry and complex "slog-fest," Jeffrey L. Condon's enthusiasm, humor, and easily understandable style leap from the pages to walk you through the process of obtaining the life-enhancing gift of a Living Trust that's right for you and your family. He shares with you, and your financial advisor, his three decades of hard-won wisdom on the human and monetary sides of inheritance planning through straightforward and easy-to-understand explanations that:
Address the very important inheritance issues that you must consider before your first meeting with your Living Trust attorney. Spell out how to live with your Living Trust during your lifetime. Reveal how you can "die knowing" that your Living Trust's inheritance instructions will be faithfully and legally carried out to the letter. Guide your family away from "inheritance minefields" that can create conflict, division, and estrangement. Share valuable tips on ensuring that your Living Trust's assets will be protected after your passing for your children and from your children's risks and problems. Even with changing trends and evolving laws, the Living Trust will always be the main vehicle in America for the after-death transfer of your assets to your family. And you and your advisor can always rely on the latest edition of The Living Trust Advisor to explain everything you need to know about your Living Trust for your eternal peace of mind.
From the Back Cover
Praise for THE LIVING TRUST ADVISOR "Jeffrey Condon is both a lawyer and a coach a rare combination. He puts both talents to work in this new edition of The Living Trust Advisor, transforming what could have been a deadly read into one that not only instructs, but keeps you smiling along the way. Families and their advisors know far too little about living trusts, but this accessible book will go a long way toward remedying that."
Gregory Curtis, Chairman and Founder, Greycourt Co., Inc. "Jeff nails it! A guide to living trusts that's loaded with weighty advice yet reads like a friendly conversation over coffee. This book brings real life to living trusts and will lead to new energy in talks with your family and with your lawyer."
Hartley Goldstone, Wise Counsel Research Associates; coauthor of Family Trusts: A Guide for Beneficiaries, Trustees, Trust Protectors, and Trust Creators
The Authoritative Guide to Living Trusts
The renowned family inheritance attorney and author of the bestselling Beyond

the Grave continues to share sought-after guidance on how you can create a seamless and effective inheritance plan that's right for you and your family. Fully updated and revised to cover the most recent estate tax law changes and best legal practices in the Inheritance Arena, this Second Edition offers you a reliable resource and guidebook for every stage of the Living Trust process, from establishing your Living Trust, to living with it, to carrying out its inheritance instructions after you're gone. Expertly written with Jeffrey L. Condon's trademark enthusiasm, humor, and easily understandable style, *The Living Trust Advisor* gives you straightforward and "horse-sense" advice on how to: Avoid common pitfalls in your Living Trust by examining cautionary tales from the real world Prevent family conflict and battles that often arise when your family divides the "family money" Understand why you still need to deal with the estate tax, even if you believe the estate tax does not apply to you Protect your children's inheritance from their financial risks and other problems, thereby securing a future for your succeeding generations *The Living Trust Advisor, Second Edition* walks with you step-by-step as you develop a low-maintenance Living Trust before your first meeting with your attorney, and illustrates how to establish, maintain, and carry out a rock-solid Living Trust for your lifetime and beyond.

About the Author JEFFREY L. CONDON, ESQ. has practiced in trust, estate, and probate law since 1987 at the law offices of Condon Condon in Santa Monica, California. With his late father, Gerald M. Condon, he is the coauthor of *Beyond the Grave: The Right Way and the Wrong Way of Leaving Money to Your Children (and Others)*, the bestselling inheritance planning book in American publishing history, which the *Wall Street Journal* called the "best estate planning book in America." When not tending to his clients' Living Trusts and inheritance matters, Jeffrey enjoys swimming 3,000 meters daily with Southern California Aquatics, dining with his lovely girlfriend, Kim, listening to '70s and '80s pop music, getting together with his lifelong friends, and finding opportunities to spend quality time with his grown children.