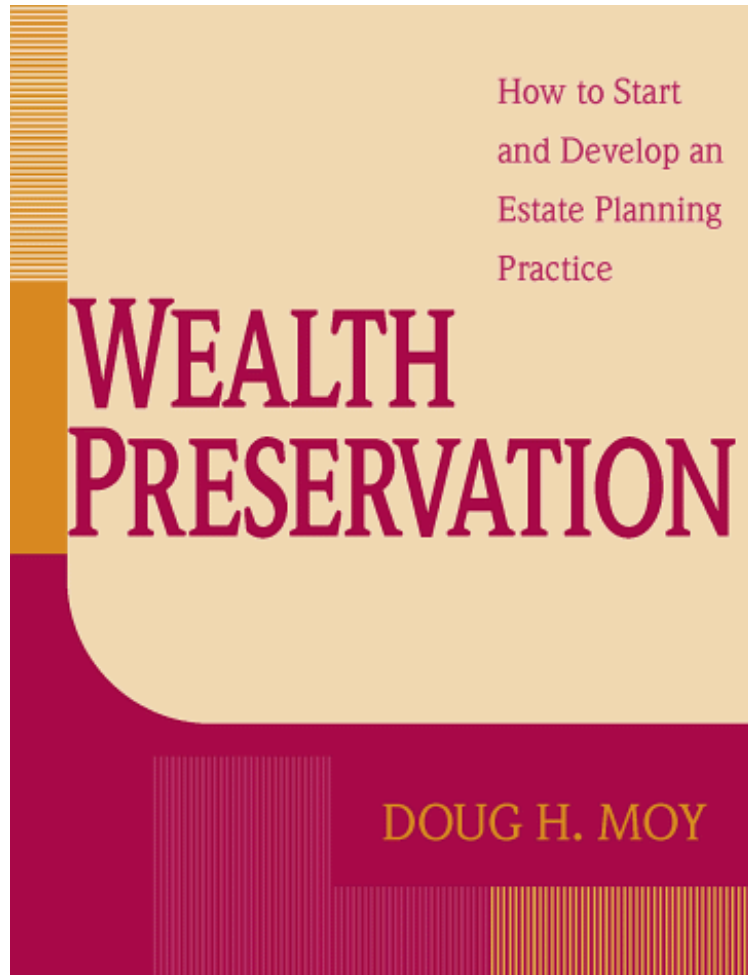


# Wealth Preservation: How to Start and Develop an Estate Planning Practice

*Doug H. Moy*

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**Doug H. Moy : Wealth Preservation: How to Start and Develop an Estate Planning Practice** before purchasing it in order to gage whether or not it would be worth my time, and all praised Wealth Preservation: How to Start and Develop an Estate Planning Practice:

0 of 0 people found the following review helpful. Great bookBy Derek McnEALThis is a great book for accountants who perform Estate Planning very informative10 of 23 people found the following review helpful. Be CarefulBy A CustomerBe careful about the unauthorized practice of law. An accountant or financial planner cannot legally write a Will or a Trust document. No lawyer worth his salt would sign off on a document drafted by someone who the state has not allowed to practice law.

Once the exclusive domain of specialist attorneys, estate planning is now a highly lucrative part of many accountants' and tax professionals' practices nationwide. If you are an accountant who would like to take advantage of this national trend as a way to diversify your services and significantly increase your profit base, this book is for you. Based on author Doug H. Moy's more than twenty-five years as a successful estate planning professional, it tells you everything you need to know about planning, building, managing, and marketing a thriving estate planning practice. Writing in a straightforward, jargon-free style, Moy deftly guides you step-by-step through the entire estate planning process. He shows you how to work with attorneys and clients to develop a solid, legally structured estate plan for maximum asset protection, estate preservation, and privacy. What's more, he shares the original wealth preservation and transfer strategies that helped make him one of today's most respected estate planning specialists. But that's not all. The fruit of Moy's two and a half decades as head of a national estate planning business, *Wealth Preservation* also provides you with a complete blueprint for starting and running your own successful estate planning practice, from fee-setting and billing to drawing up a consulting agreement and staying on top of the latest changes in the tax laws. An indispensable resource for PAs, EAs, CPAs, CFPs, insurance professionals, and banking service providers, *Wealth Preservation* contains a gold mine of proven business tools and techniques, including: \* Methods for developing estate planning business among established clients \* Prospecting how-to's for finding and qualifying new clients \* All of the documentation you'll need in ready-to-use format \* n original client financial information checklist that helps you get all of the crucial facts necessary to develop and prepare written plans and avoid malpractice suits \* Worksheets that let you calculate estate taxes quickly and effortlessly--without expensive computer hardware and software \* An original information storage and retrieval system A total guide to planning, building, managing, and marketing a thriving estate planning practice In this highly accessible guide to estate planning, expert Doug Moy shares everything he knows about establishing and managing a successful estate planning practice. Drawing on more than twenty-five years as head of his own successful national estate planning practice, Moy: \* Clearly explains how to start your own estate planning practice \* Guides you step-by-step through the entire estate planning process \* Shows you how to work with attorneys and clients to develop a solid estate plan \* Describes techniques for selling estate planning services to old and new clients \* Covers all the important basic business issues, including fee-setting, billing, consulting agreements, working with attorneys, and more \* Supplies all of the crucial documentation you'll need in your practice \* Offers an original checklist that helps you guarantee that you get all of the important facts you need about clients' personal finances \* Includes worksheets that make calculating estate taxes quicker and easier than ever \* Provides a complete client fact-finding form for gathering personal and financial information Read *Wealth Preservation* and find out how to broaden your professional horizons and increase your revenues by making estate planning a part of your practice.

From the Publisher For accountants and other tax professionals establishing estate planning as a practice niche, this book is an essential, jargon-free guidebook that explains how to achieve maximum asset protection, estate preservation, and privacy for clients. From the Back Cover Once the exclusive domain of specialist attorneys, estate planning is now a highly lucrative part of many accountants' and tax professionals' practices nationwide. If you are an accountant who would like to take advantage of this national trend as a way to diversify your services and significantly increase your profit base, this book is for you. Based on author Doug H. Moy's more than twenty-five years as a successful estate planning professional, it tells you everything you need to know about planning, building, managing, and marketing a thriving estate planning practice. Writing in a straightforward, jargon-free style, Moy deftly guides you step-by-step through the entire estate planning process. He shows you how to work with attorneys and clients to develop a solid, legally structured estate plan for maximum asset protection, estate preservation, and privacy. What's more, he shares the original wealth preservation and transfer strategies that helped make him one of today's most respected estate planning specialists. But that's not all. The fruit of Moy's two and a half decades as head of a national estate planning business, *Wealth Preservation* also provides you with a complete blueprint for starting and running your own successful estate planning practice, from fee-setting and billing to drawing up a consulting agreement and staying on top of the latest changes in the tax laws. An indispensable resource for PAs, EAs, CPAs, CFPs, insurance professionals, and banking service providers, *Wealth Preservation* contains a gold mine of proven business tools and techniques, including: Methods for developing estate planning business among established clients Prospecting how-to's for finding and qualifying new clients All of the documentation you'll need in ready-to-use format n original client financial information checklist that helps you get all of the crucial facts necessary to develop and prepare written plans and avoid malpractice suits Worksheets that let you calculate estate taxes quickly and effortlessly without expensive computer hardware and software An original information storage and retrieval system A total guide to planning, building, managing, and marketing a thriving estate planning practice In this highly accessible guide to estate planning, expert Doug Moy shares everything he knows about establishing and managing a successful estate planning practice. Drawing on more than twenty-five years as head of his own successful national estate planning practice, Moy: Clearly explains how to start your own estate planning practice Guides you step-by-step through the entire estate planning process Shows you how to work with attorneys and clients to develop a solid estate plan Describes techniques for selling estate planning services to old and new clients Covers all the important basic business issues,

including fee-setting, billing, consulting agreements, working with attorneys, and more Supplies all of the crucial documentation you'll need in your practice Offers an original checklist that helps you guarantee that you get all of the important facts you need about clients' personal finances Includes worksheets that make calculating estate taxes quicker and easier than ever Provides a complete client fact-finding form for gathering personal and financial information Read Wealth Preservation and find out how to broaden your professional horizons and increase your revenues by making estate planning a part of your practice.About the AuthorDOUG H. MOY is a consultant in estate and gift taxation and planning whose clients include accountants, attorneys, and individual clients nationwide. He is an active member of the National Society of Accountants (NSA) and the National Association of Tax Practitioners (NATP) and a former member of the Curriculum Advisory Board of the College for Financial Planning. A nationally recognized author in the field whose books include Living Trusts (Wiley) and Estate Planning Simplified (Wiley), he was awarded the 1995 Golden Quill Award by the NSA for his many articles published in the National Public Accountant.