

(Ebook pdf) Women and Money A Practical Guide to Estate Planning

# Women and Money A Practical Guide to Estate Planning

Patricia M Annino

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## WOMEN *and* MONEY

A PRACTICAL GUIDE TO  
ESTATE PLANNING



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**Patricia M Annino : Women and Money A Practical Guide to Estate Planning** before purchasing it in order to gage whether or not it would be worth my time, and all praised Women and Money A Practical Guide to Estate Planning:

0 of 0 people found the following review helpful. Women and MoneyBy Bob maguireA clear guideto follow through life's many transitions. Single, widowed or divorced Patricia provides a clear path to navigate changing life circumstance.1 of 1 people found the following review helpful. Cover's Practically EverythingBy Fritz R. WardFor

many people, including I'm sorry to say myself, estate planning involves simply buying life insurance and making a will. Many more people do not even do that much. It's hard to face our own mortality. But the reality is in the modern world, we do need to plan for the time when we are no longer around. And in an era where women control a large portion of society's wealth, they in particular need to plan for their children, parents, husbands, and other heirs or concerns. All too often, the author notes, women defer to their husbands when it comes to estate planning. This book is written with the intent of helping women (and really, everyone else) to make informed decisions. This book covers living wills, revocable and non-revocable trusts, non traditional uses of life insurance, and of course that other certainty besides death, taxes. In all, it is a very readable guide filled with actual examples of what can go wrong without proper estate planning. It is a useful book, geared primarily towards middle aged women, but anyone can find value in it. I strongly recommend the book. It should stir readers to re examine their own estate plans, or even begin making them. It had that effect on me, and I was not part of the target audience. 1 of 1 people found the following review helpful. A Superb Financial and Estate Planning Resource for Women By Alexander A. Bove Jr. As an author and a practicing attorney in the field of estate planning, I am always on the lookout for materials, particularly readable books, that clearly, simply, and accurately explain some of the unfortunately complicated issues that clients must understand in developing and planning their estates. This concern is a bit compounded when one is dealing with women clients, since in many instances their circumstances are often unique. Thus, I was positively thrilled with the publication of Attorney Annino's book, "Women Money." In a clear and accurate way, Patricia covers virtually every issue that women face in planning their estates. I cannot recommend the book more highly, and in fact I am planning to purchase a supply of copies to give to my own clients. Alexander A. Bove, Jr. Boston, Massachusetts

Women control 75 percent of the total personal wealth in the United States today, fill more than half the jobs, earn more than half the college degrees, and make up the fastest growing sector of new business owners. Yet most American women have not taken steps to put the legal mechanisms in place through estate planning to protect their assets, their families and themselves. This book is for you. *Women and Money, A Practical Guide to Estate Planning* is an exhortation, a resource, and a trusted companion. Written by attorney Patricia Annino, who has been advising both men and women about estate planning for more than two decades, the book makes a complicated process easily accessible to readers by explaining away the legal jargon, bringing the issues to life with real life stories, and addressing the concerns of women in all age and economic groups. The first time a new mother leaves her baby with a sitter, she leaves detailed instructions. Estate planning is a way to leave instructions for a lifetime, a way to make sure that if anything ever happens to you, the person you want to take care of your children will do so, your directions will determine the care they will be given, and your finances will be great enough to cover all costs. This is a book for women with significant assets and women with concerns about their financial futures, women with elderly parents and women with special needs children, single, married, divorced, widowed, and remarried women. In short, this is a book for you and for any woman who wants to control her own financial destiny, protect herself and protect those she cares about most.

From the Author In my 25 years as an estate planning attorney I have observed that most women have the instinct to make sure that everyone else- spouse, partner, children, parents are well taken care of and forget what the flight attendant says to all passengers every time a plane is about to take off - if you are traveling with a small child and the barometric pressure changes in the cabin take that oxygen mask and put it over your own face first. It is only when you take that mask and protect yourself that you will have the strength to protect the child. In life that is true too. Most women in this country will inherit twice - once from their parents and once from their husbands. Women must pick up the keys to the kingdom and understand that it is their obligation to protect themselves. Make sure you know what will happen if your partner/spouse/significant other dies or becomes disabled. As you evolve through the phases of life - single, married, divorced, widowed, remarried, focus on what you need to do to protect yourself in that phase and understand that continuing to plan is important. It is my hope that reading this book will educate and empower you to act and protect yourself, your family and those that you love. About the Author Patricia M. Annino, Attorney is a nationally recognized authority on estate planning and a partner in the Boston law firm of Prince Lobel Glosky Tye LLP where she chairs the Estate Planning department. A graduate of Smith College and Suffolk University Law School, she earned a Masters Degree in taxation at Boston University School of Law. She has taught Masters level classes on Estate and Gift Taxation and Estate Planning. She has conducted more than 120 seminars on the subject for public and private organizations, including IBM; BNY/Mellon, Northeastern University, AICPA, Boston Tax Institute, Harvard Business School, Smith College, John Hancock Life Insurance Company, Merrill Lynch, Bank of America, Foundation for Continuing Education, the American, Massachusetts, and Boston Bar Associations. Ms. Annino has received the highest (AV) rating from the Martindale-Hubbell Law Directory and has been repeatedly selected by her peers as one of the "Best Lawyers in America" (Trust and Estates). She has been voted a Massachusetts Superlawyer and a Top 50 Massachusetts Female SuperLawyer by her peers and an independent Blue Ribbon Committee (published in Boston Magazine and SuperLawyer Magazine). In 2007 her peers in the Boston Estate Planning Council

voted her the "Estate Planner of the Year". She is a Fellow in the American College of Trust and Estates Counsel (ACTEC). She is the author of several professional texts, including Estate Planning in Massachusetts (Thomsen/Reuters) and Taxwise Planning for Aging, Ill, or Incapacitated Clients, published by AICPA. She is the recipient of Newton Country Day School of the Sacred Heart Distinguished Alumnae Award and the Suffolk University School of Law Outstanding Alumni Achievement Award. She is also the author of "Cracking the \$\$ Code: What Successful Men Know and You Don't (Yet)" and coauthor of "Women in Family Business: What Keeps You Up at Night?"