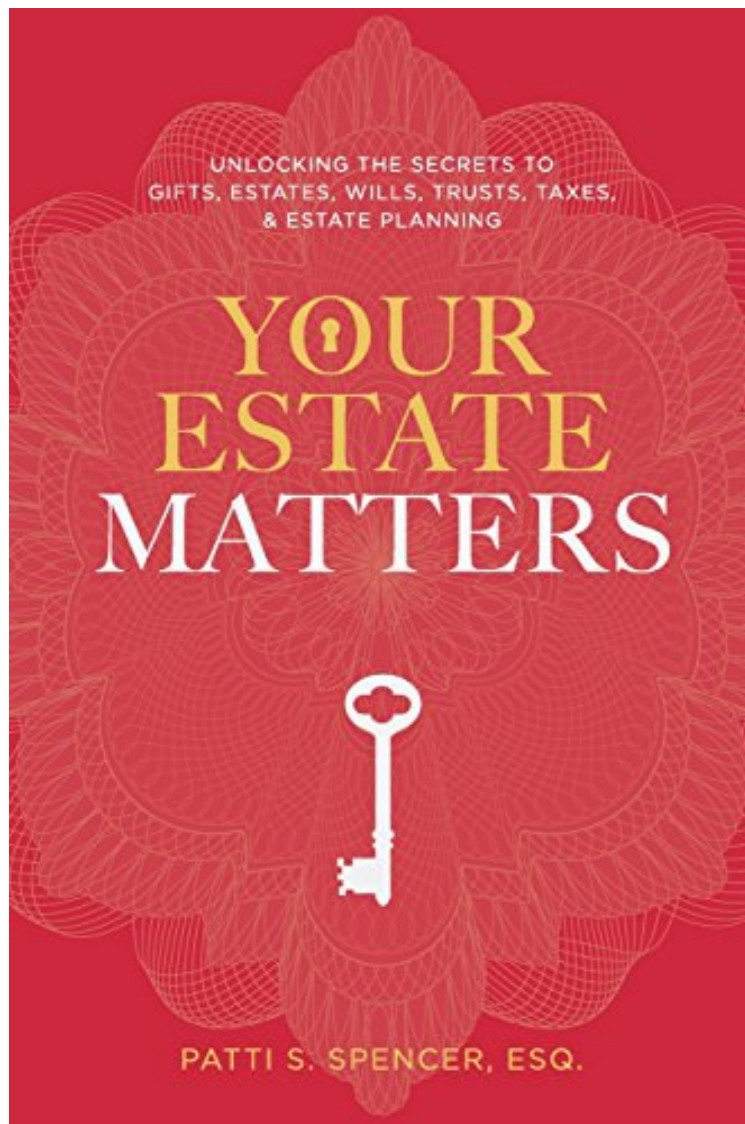


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Your Estate Matters: Gifts, Estates, Wills, Trusts, Taxes and Other Estate Planning Issues

Patti S. Spencer

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decided to read a book prior to meeting with an attorney. There is a lot of info online, but for something this important a bound book offered the credibility of knowing exactly who authored the information. Laws change frequently, so I wanted the most up-to-date bound book I could buy. This book has a copyright date of 2015. Imagine my surprise to reach page 485 of this book and read "But it's only 2005, so that might still change." Knowing that I knew nothing about estate planning and I needed to learn a lot, I had determined to read ALL of this book, from the first page onward. It didn't take me long to figure out that this book is a collection of articles previously published by the author. I realized this when I began noticing (sometimes lots of) repetition in the text. A good redundancy check would have saved quite a few trees and a whole bunch of my time. I tilted this review 'Misleading' because I did not read anything in the product info prior to purchasing this book that stated this is a collection of previously published articles. If that gets added to the product info, and someone informs me of the fact, I will be glad to update my review. The author knows her stuff and writes it clearly. I am, indeed, learning a lot. To be as useful as I wanted, this book needed two things: a good edit to eliminate duplicated info; and an updating of years-old info.

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Patti Spencer has learned everything there is to know on this subject and has written down a good bit of it in this book. This is a tremendous help to individuals as they try to sort out their estate and tax planning needs - Matthew J. Creme, Jr. Partner at Nikolaus Hohenadel LLP, Former President of the PA Bar Association "When it comes to estate planning and tax law, there's simply no one better than Patti Spencer. She demystifies estate planning in a way that is accessible for all. Known for her no nonsense style and humor, this book is a must-have for anyone making their estate plans or just trying to understand the process" - Samuel Bressi, President CEO of Lancaster County Community Foundation "I have read Patti Spencer's newspaper column on a weekly basis for several years now, and never tire of learning more about estate planning and tax law. Patti manages to take complicated issues and reduce them to their simplest form" - David Griffith, Former Business Editor at Intelligencer Journal We don't intend to neglect our estate and financial plans, but it is so easy to be overwhelmed with conflicting financial advice. Your Estate Matters will bring clarity to those pesky, rapidly changing tax laws and will provide you with the accurate information you need to properly manage your estate. Your Estate Matters offers a practical down-to-earth approach that explains the ins and outs of estate planning, tax savings, and other issues that directly affect your family's pocketbook: income tax, living wills, trusts, prenuptial agreements, college savings, and retirement planning. If you want to stay ahead of the curve, are ready to plan your own estate, have aging parents, or have recently retired, this is the book you need to read.

About the Author Patti S. Spencer, Esq, is widely recognized as a preeminent estate planning attorney and is the founder and owner of Spencer Law Firm LLC (SLF) in Lancaster, PA. In her 35 years of practicing law, she has assisted both clients and other professionals with estate planning, probate, taxation, expert witness case work, and closely held business issues such as fiduciary income tax, business succession planning, and corporate tax planning. Spencer is a peer-nominated fellow of the American College of Trust and Estate Counsel (ACTEC) and has been a super lawyer for six years, placing her in the top five percent of state-wide lawyers. Spencer graduated summa cum laude from Dickinson College and received her J.D. and LL.M. in Taxation from Boston University School of Law. For 12 years Spencer has written a weekly column called Taxing Matters for the business section of the Lancaster Intelligencer New Era, the primary area newspaper. In addition, Data Trace publishes Spencer's two-volume loose leaf Pennsylvania Estate Planning, Wills and Trusts Library Forms and Practice Manual, which is updated annually with a supplement.