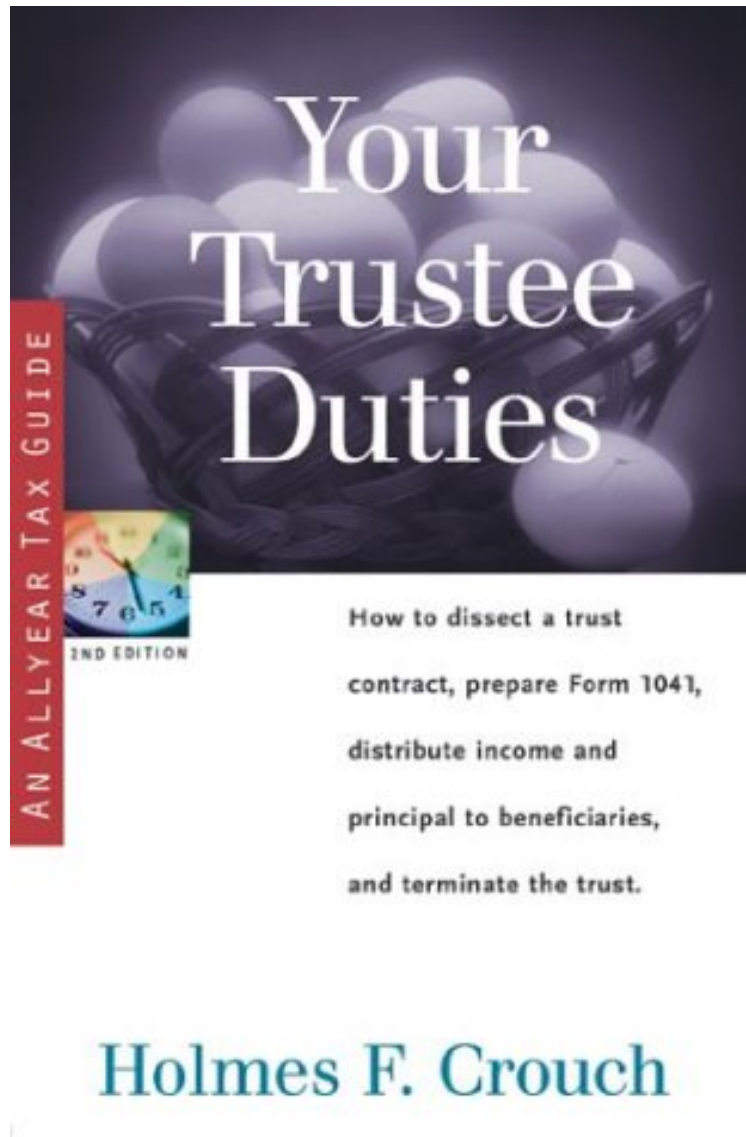


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Your Trustee Duties: How to Dissect a Trust Contract, Prepare Form 1041, Distribute Income and Principal to Beneficiaries, and Terminate the Trust (Series 300: Retirees Estates)

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With all the living trusts out there, this book is an absolute requirement for your library. It will assist you in planning for and then executing your duties as trustee. It combines knowledge from attorneys, case law, income tax code and real life situations. The author has a keen sense of dry accountant-type humor which clarifies serious situations. Step-by-step help, but much more than a simple checklist. The examples will also assist you in avoiding landmines from failing to fulfill your duties by allowing you to clearly understand your obligations and a time-line for execution of them.
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By satisfied reader
I bought this book because I was nervous about being a trustee. Particularly dealing with all the IRS rules. So far the book has been helpful. In addition to what is in the book, if you need to call the IRS to clarify something, sit in a comfortable chair and have good book to read before you dial the telephone. I was always on hold for a long time (half hour or more) when I called the IRS although they were nice and helpful once I finally got through to them.

The obligations and responsibilities of trustees are laid out in this guide to working with attorneys, understanding tax procedures, and real-life examples. From completing a 1041 form to determining which financial records to pay particular attention to, this primer offers tips for every step of being a conscientious trustee. Instructions for closely reviewing a contract, taking inventory of the sources of trust income, and terminating a trust are also included.

About the Author
Holmes F. Crouch is an IRS licensed tax professional and the author of *Decisions When Retiring*, *Simplifying Your Estate*, and *Your Executor Duties*. He lives in Saratoga, California.