

The complete guide to organizing your records for estate planning - step-by-step instructions with companion CD-ROM

Atlantic Pub. Group, Inc. - The Complete Guide to Organizing Your Records for Estate Planning Step

Description: -

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Americans -- Philippines -- Biography.
 Stonehill, Harry.
 Caribbean Conference of Churches.
 Yangtze River Gorges (China) -- Fiction
 Hong, Ying, -- 1962- -- Translations into English
 Rio Grande Watershed -- Maps.
 Watersheds -- New Mexico -- Maps.
 Watersheds -- Texas -- Maps.
 Groundwater -- Rio Grande Watershed -- Maps.
 Records -- Management

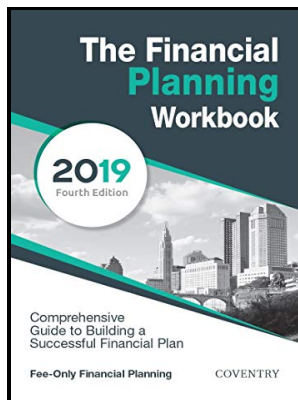
Finance, Personal

Estate planningThe complete guide to organizing your records for estate planning - step-by-step instructions with companion CD-ROM

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Tags: #The #Complete #Guide #to #Organizing #Your #Records #for #Estate #Planning

Complete Guide to Organizing Your Records for Estate Planning Step

I never would have thought of making a family tree for my kids as part of an estate planning portfolio, but it makes perfect sense.

The Complete Guide to Organizing Your Records for Estate Planning Step

Estate taxes become really important when passing on a larger estate and although this book mentions some strategies in those particular cases, it doesn't detail so the help of an attorney will be required. Sensitive health care matters become an issue when direction is absent, leaving the family, doctors, and sometimes a judge trying to determine your wishes. Particularly with regard to your health care decisions, clearly stating your wishes and appointing someone to direct them is imperative at every age because accidents happen.

The Complete Guide to Organizing Your Records for Estate Planning

This book, written in an easy-to-understand language, will walk you through the process of organizing your records and make the process much easier for you and your family. Additionally, you will learn about the documents that should be included in your estate plan, such as insurance policies, Social Security cards, birth certificates of minor children, stock brokerage statements, credit card numbers and statements, certificates of deposit, real estate deeds, mortgage statements, retirement account savings, non-retirement account savings, and current bank statements. These mementos can be very meaningful to family and friends, but an attorney generally is not the appropriate person to consult in these matters.

The complete guide to organizing your records for estate planning : step

The CD-ROM is filled with sample documents and worksheets, as well as a checklist of often overlooked information, including any medications you take, where you worked, where your savings and checking accounts are located, where your car title is located, what your funeral plans or

wishes are, and who should receive what. In this new book, you will learn how to find an organizational system that works for you, where to look for records, what to record, who to tell, where to keep records, and how often to update your records. Hiring an attorney to assist you may cost more than you are willing to spend.

The Complete Guide to Organizing Your Records for Estate Planning: Step

Planning your estate is a long, complicated process that requires much time and effort. They felt like endorsements for people to use lawyers and didn't seem to add much beyond what had already been stated in the body of the book.

Books: The Complete Guide to Organizing Your Records for Estate Planning: Step

I had cases where the only way the executor or trustee learned of accounts and insurance policies was by waiting for statements in the mail. Additionally, you will learn about the documents that should be included in your estate plan, such as insurance policies, Social Security cards, birth certificates of minor children, stock brokerage statements, credit card numbers and statements, certificates of deposit, real estate deeds, mortgage statements, retirement account savings, non-retirement account savings, and current bank statements. You will also find information on creating a will or a living will, setting up a trust, assigning power of attorney, and filling out health care directives.

Books: The Complete Guide to Organizing Your Records for Estate Planning: Step

The idea the author offers is to create a 3 ring binder to organize and store information.

The Complete Guide to Organizing Your Records for Estate Planning Step

In addition, you will save your family the frustration of searching for these documents if something should ever happen to you. An estate planning attorney, accountant, and financial planner can help with the complex analysis of a plan, but they are not there in your home arranging your documents; that is your responsibility.

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