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



Synopsis

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.

Book Information

Paperback: 574 pages

Publisher: AuthorHouse (January 13, 2015)

Language: English

ISBN-10: 1496935292

ISBN-13: 978-1496935298

Product Dimensions: 6 x 1.4 x 9 inches

Shipping Weight: 2.1 pounds (View shipping rates and policies)

Average Customer Review: 4.8 out of 5 stars [See all reviews](#) (12 customer reviews)

Best Sellers Rank: #412,151 in Books (See Top 100 in Books) #83 in [Books > Law > Estate Planning > Wills](#) #136 in [Books > Law > Estate Planning > Estates & Trusts](#) #339 in [Books > Law > Tax Law](#)

Customer Reviews

If you just came back from your lawyer and are having trouble understanding the difference between a living trust and a living will, this is the book for you! My dad used to tell me that you don't really understand something unless you can explain it to someone else. Patti can explain complex concepts like charitable trusts, remainder interests, and applicable exclusion amounts so that anyone can understand them. I particularly enjoyed the section on Estate Planning for the Family Business which included helpful discussions of how to plan for the business after the owner's retirement.

Patti Spencer, Esquire, is widely recognized as an authority on estate planning matters. She has written a weekly column in the Lancaster Intelligencer Journal, "Taxing Matters" since 1999. Her book, "YOUR ESTATE MATTERS" grew out of those weekly columns. Patti is known for her "down to earth" conversational style and for using humor in presenting what most times is a dry and dull subject. Patti presents very valuable information and advice which will enable the reader to greatly increase their knowledge on the subject. The book is easy to read and helps debunk many myths about estate planning, including the one about: if you don't have a will, the state gets everything." This book is the one resource I have found that provides practical and understandable advice and reasonings regarding estate matters. Patti has really hit a home run with this book. It is a must read for anyone, from an individual, a retiree, a business person or anyone who is getting prepared to address their estate matters. In 35 years of professional life, this is one of those valuable resources that has the potential to have a profound impact on changing the way people think about the subject of estate planning. I highly recommend this book and will be sure that my business clients, especially those with family owned businesses, get this book and read it cover to cover. It should become a part of every business owner's business survival kit and everyone's personal library. J. Glenn Ebersole, Jr., Founder & Chief Executive, J. G. Ebersole Associates and The Renaissance Group (TM), and author of "Glenn's Guiding Lines - Thoughts From Your Strategic Thinking Coach" Newsletter.

Ok, normally don't review books like this, but if you are looking for a detailed explanation of planning an estate, this is it. Wills, Trusts, all the bells and whistles explained with advantages/disadvantages. You don't have to have a law degree or be a financial planner for this. In fact, you should read this book (you can do it a la carte) to have a more informative discussion with an attorney or planner.

I needed to do estate planning and 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.

Your Estate Matters is a great introduction to the whole topic of estate planning. I started reading this with little or no knowledge regarding any of the topics...trusts, estate plans, tax strategies, etc. I feel that I now have a good, basic understanding of them. This book is accessible to all, even the non-experts, but does not talk down to the reader in any way.

I was thrilled to find that someone finally wrote a resource book that I can understand that answers my financial and estate planning questions! The author's sense of humor actually turned dull topics into fun reading. I recommend this book for anyone planning to see an attorney for a will or estate settlement. You'll be well prepared.

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