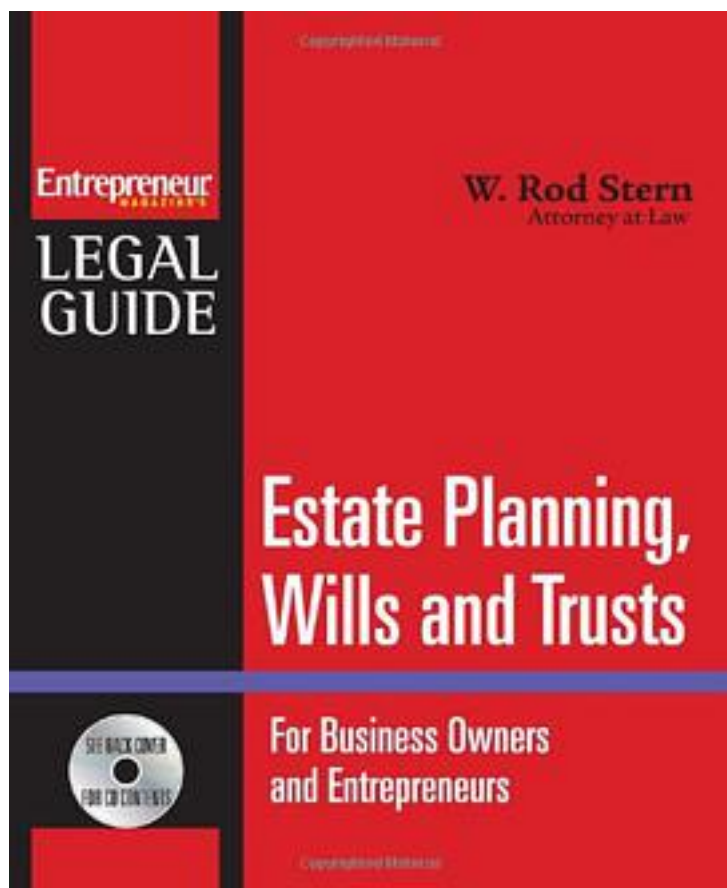


Estate Planning, Wills, and Trusts



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Estate plans are created for a variety of reasons, but they aren't just about distributing your assets. First and foremost, you want the security of knowing that you have provided for your loved ones and minimized the legal issues and financial insecurity they might otherwise face upon your death. As a business owner, you need a plan for business succession or transition and have a unique set of considerations to take into

account. You may even want to leave a charitable economic legacy. In any event, your estate plan should be tailored to fit your personal situation. With a special emphasis on business owners, W. Rod Stern covers: Wills, living trusts, gifts, charitable trusts and more The pros and cons of probate How to transition your business so your heirs can benefit Selecting trustees and guardians Reducing estate taxes Long-term asset management Begin now, and design an estate plan that protects both your family and your business. Sample documents include: Simplified Sample Will Simplified Sample Family Trust Financial Summary Worksheet Total Assets and Liabilities Worksheet Your Family Documentation Worksheet Asset Value Test Income and Expense Test Calculating Life Insurance Needs Tax Impact of Gifting Common Distribution Provisions for Wills and Rrusts IRS Publication 950 Introduction to Estate and Gift Taxes IRS Publication 706 U.S. Estate Tax Return IRS Publication 709 U.S. Gift Tax Return IRS Publication 1041 U.S. Income Tax Return for Estates and Trusts Schedule K1, 1041 Beneficiary's Share of Income, Deductions, Credits, etc. For 30 years, Entrepreneur has provided the most trusted business advice available to business owners. Our legal guides continue that tradition by offering current and cost-effective legal advice so you can resolve the business and legal issues you face on a daily basis. We also strive to help you identify when it's in your best interest to seek the personalized advice and services of a practicing lawyer.

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