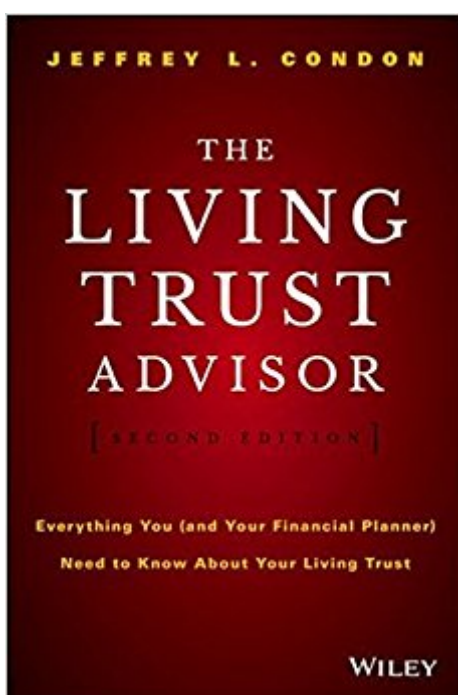


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# The Living Trust Advisor: Everything You (and Your Financial Planner) Need To Know About Your Living Trust



## Synopsis

A comprehensive guide to living trusts, with expert financial and legal guidance The Living Trust Advisor is an expert guide for both advisors and their clients on the complex process of establishing, living with, and maintaining a living trust. Written by renowned family inheritance attorney Jeffrey L. Condon, this book discusses the various aspects of this important document, and shows you how to manage a seamless transfer of assets to various beneficiaries. This new second edition has been fully updated and revised to reflect the extensive changes to the Estate Tax Law that have taken place since the initial publication, giving you the most up-to-date information and guidance on preserving your wealth and helping your heirs avoid estate tax liability. You'll develop a vision for your trust before you ever meet with an attorney or other key players, and learn how to establish and maintain a trust that remains rock-solid for your lifetime and beyond. As the living trust has replaced the will as the primary means of settling after-death estates, clear guidance and current legal information is of utmost importance for advisors and clients alike. This book is a valuable resource for every stage of planning and execution, helping you ensure that you provide for your beneficiaries the way you intend. Know what to think about before your first meeting with a lawyer

Establish and manage your living trust to carry out your wishes Identify potential inheritance problems and build solutions into the trust Distribute assets to future generations, and protect them after the transfer Dealing with complex financial and legal issues while facing our own mortality is a difficult task, but making these decisions is critical to the future outcome of your estate. The Living Trust Advisor expertly guides you through the process so you can be confident that your wishes will be carried out.

## Book Information

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## Customer Reviews

The last great lesson you leave to your family is the inheritance plan you make in your Living Trust. Creating a Living Trust that effectively carries out your inheritance instructions requires more than just printing out "one-size-fits-all" forms, checking off a few boxes, and signing where instructed. You and your financial advisor have to know the real-world impact of the words you inject into the document. Otherwise, your family, and the assets you leave to them, may become victim to the Law of Unintended Consequences. Fully revised and updated to reflect the most recent laws and best practices in the Inheritance Arena, this Second Edition skillfully shows you step-by-step how to create a Living Trust that easily and seamlessly transfers your lifetime of accumulations to your spouse, children, grandchildren, and other beneficiaries. While such a discussion can become a dry and complex "slog-fest," Jeffrey L. Condon's enthusiasm, humor, and easily understandable style leap from the pages to walk you through the process of obtaining the life-enhancing gift of a Living Trust that's right for you and your family. He shares with you, and your financial advisor, his three decades of hard-won wisdom on the human and monetary sides of inheritance planning through straightforward and easy-to-understand explanations that: Address the very important inheritance issues that you must consider before your first meeting with your Living Trust attorney. Spell out how to live with your Living Trust during your lifetime. Reveal how you can "die knowing" that your Living Trust's inheritance instructions will be faithfully and legally carried out to the letter. Guide your family away from "inheritance minefields" that can create conflict, division, and estrangement. Share valuable tips on ensuring that your Living Trust's assets will be protected after your passing for your children and from your children's risks and problems. Even with changing trends and evolving laws, the Living Trust will always be the main vehicle in America for the after-death transfer of your assets to your family. And you and your advisor can always rely on the latest edition of *The Living Trust Advisor* to explain everything you need to know about your Living Trust for your eternal peace of mind.

Praise for THE LIVING TRUST ADVISOR "Jeffrey Condon is both a lawyer and a coach—a rare combination. He puts both talents to work in this new edition of *The Living Trust Advisor*, transforming what could have been a deadly read into one that not only instructs, but keeps you smiling along the way. Families and their advisors know far too little about living trusts, but this accessible book will go a long way toward remedying that." —Gregory Curtis, Chairman and

Founder, Greycourt & Co., Inc. "Jeff nails it! A guide to living trusts that's loaded with weighty advice yet reads like a friendly conversation over coffee. This book brings real life to living trusts and will lead to new energy in talks with your family and with your lawyer." —Hartley Goldstone, Wise Counsel Research Associates; coauthor of Family Trusts: A Guide for Beneficiaries, Trustees, Trust Protectors, and Trust Creators The Authoritative Guide to Living Trusts The renowned family inheritance attorney and author of the bestselling Beyond the Grave continues to share sought-after guidance on how you can create a seamless and effective inheritance plan that's right for you and your family. Fully updated and revised to cover the most recent estate tax law changes and best legal practices in the Inheritance Arena, this Second Edition offers you a reliable resource and guidebook for every stage of the Living Trust process, from establishing your Living Trust, to living with it, to carrying out its inheritance instructions after you're gone. Expertly written with Jeffrey L. Condon's trademark enthusiasm, humor, and easily understandable style, The Living Trust Advisor gives you straightforward and "horse-sense" advice on how to: Avoid common pitfalls in your Living Trust by examining cautionary tales from the real world Prevent family conflict and battles that often arise when your family divides the "family money" Understand why you still need to deal with the estate tax, even if you believe the estate tax does not apply to you Protect your children's inheritance from their financial risks and other problems, thereby securing a future for your succeeding generations The Living Trust Advisor, Second Edition walks with you step-by-step as you develop a low-maintenance Living Trust before your first meeting with your attorney, and illustrates how to establish, maintain, and carry out a rock-solid Living Trust for your lifetime—and beyond.

I found this book to be long on words and short on information when compared to the Nolo legal guides, and therefore skeptical of the 5 star reviews. The main content of the book seemed to be anecdotes on how people become deviously clever and horribly selfish over assets that were never theirs in the first place, while the lessons provided in these anecdotes often seemed to contradict one another. Also, the author took pride in changing some of the legal terminology to make it "easier to understand", but I did not find that the case at all.

Clear, helpful, readable, this book is just what we needed even though we had a living trust. It's so well organized that it can be used as a reference. I will have confidence to assert what I really want the next time I meet with our trust attorney.

The content is well explained and reading the book will make you realize how important a living trust. I recommended to a friend to read the book and she bought one from .

## VERY HELPFUL, ANSWERED A LOT OF QUESTIONS

It's hard to believe that it is so much fun to read a book about trusts, but it's true. This is unsurprising though, because Condon's previous book "Beyond the Grave," co-authored with his father, was also fun and informative. This book does exactly what it says, telling you 'everything you need to know about your living trust.' Many readers might have a trust. But Jeffrey Condon considers all the angles and possible permutations. Should you ever leave one child more than another? What if your child is irresponsible or incapacitated? Or how do you protect assets for the next generation, should one's married life get complicated? All the answers and more are here, filled with anecdotes from real life situations. If you plan to die some day and you are going to establish a trust, you should read this book.

Jeff Condon's book is excellent. I have a complicated estate planning situation (parents, relatives, children, property, partnerships, etc.) and Mr. Condon has been an excellent advisor and attorney. This book is readable and deals with many aspects that we have covered in person. Without the book, though, I would not have had the same understanding and foundation for a meaningful estate planning process. Buy the book, read it and reference it, then go see your lawyer. You'll be smartly informed and you can make the best of the time you spend with your attorney. Thanks for issuing a new book! PWC

When you are looking for tips in the estate planning arena, this book is a great help. It is easy to digest and not tedious at all. It walks you through different kinds of real-life issues we can face while dealing with the inheritance part. I was able to buy a pre-sale of the book at Wiley.com (30% Off). Not sure if the offer is still available.

I own and have read all of Mr. Condon's books on inheritance and trusts. I highly recommend THE LIVING TRUST ADVISOR as Mr. Condon's latest work. Given the sensitive and complicated nature of this subject, Mr. Condon helps guide the reader, like me (with no formal legal training), through the 'traps', challenges and the emotions of planning for the inevitable. Mr. Condon, thank you for sharing this important information in THE LIVING TRUST ADVISOR and for your previous work.

Bravo! Best regards, Milt

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