



# Estate Planning (Wiley Corporate F&A)

*William P. Steng*

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**Estate Planning (Wiley Corporate F&A) William P. Streng**

**Plan ahead: estate planning to secure your wishes**

*Estate Planning* is your overview of the estate planning concepts that are necessary to consider when advising your clients about the different facets of wealth transfer planning. This fundamental reference presents the basic estate, gift, and trust planning ideas in a descriptive and accessible manner—allowing you to easily and conveniently access the information you need when you need it. This essential text covers the development of estate planning strategies for your clients, the fundamentals of the federal transfer tax system, relevant federal income tax rules, lifetime donative asset transfers, gratuitous property transfers at death, generation-skipping transfers, special property transfer planning considerations, and post-mortem planning.

When done effectively, estate planning enables your clients to make both lifetime and testamentary transfers of assets to beneficiaries of their choice. In the process, strategic, successful estate planning strategies conserve wealth for these beneficiaries, who are often family members of the client. Leveraging the right methods of estate planning can ensure that you achieve your client's objectives.

- Explore the fundamentals of estate planning as they relate to wealth transfer planning
- Dive into special property transfer planning considerations, including community property, life insurance, charitable transfers, closely held corporations, etc.
- Better serve your clients by having access to relevant, easy to navigate information on estate planning best practices
- Reinforce these new ideas with a comprehensive test bank

*Estate Planning* is your guide to estate planning concepts that help you protect your assets during wealth transfer—and prepare for your assets to change hands as smoothly as possible.

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