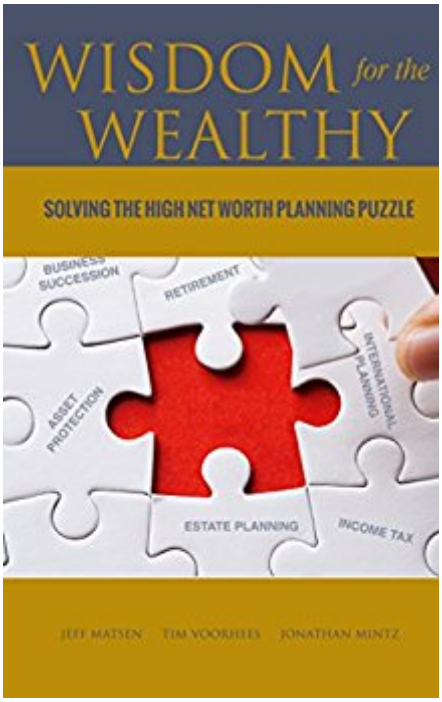
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Wisdom For The Wealthy: Solving The High Net Worth Planning Puzzle



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Synopsis

People of wealth and affluence have exercised wisdom in building up their assets and some financial security. Now the challenge to protect the wealth from taxes and creditors while maximizing after-tax assets available to fund lifestyle needs, transfers to family, and/or gifts to favorite charities.Wisdom for the Wealthy provides ideas, strategies and planning tips for putting all the pieces of the high-net-worth puzzle together and making your visions and financial goals a reality. Practical and cutting-edge designs are set forth in easy-to-understand terms and strategies. Wisdom is the name of the game. Buy this book and solve the puzzle!

Book Information

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Customer Reviews

I found this book to be very helpful. Mr Matsen and his co-authors do a great job of explaining their 'wisdom for the wealthy' and I appreciate the knowledge they have shared. It is an informative and worthwhile read!

Mr. Matsen and associates have produced a terrific tool to help navigate the complex world of

wealth management. The book is easy to read, with lots of stories that bring the issues to life and helped me get motivated to do some estate planning. For example, one section calls the estate tax a "voluntary" tax because there are ways to avoid it--and it than describes the ways to do so in a way that non-lawyers can understand.Life goes by too quickly and we often let the urgent crowd out the important--and managing one’s asset to the benefit of the family is often left undone. I highly recommend this well-written book.

Jeff, Tim and Jonathan have written a wonderful book that is a roadmap for anyone interested in protecting their assets and saving estate and income taxes. We have been clients for many years and have appreciated their experience, expertise and wisdom in this otherwise complex arena. The result has been that they have been creative in optimizing the many asset protection and estate vehicles with the objective being the future financial benefit of our family. This book is creatively illustrated and easy to understand. We highly recommend it.John Spiezia, President, JR Capital Group

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