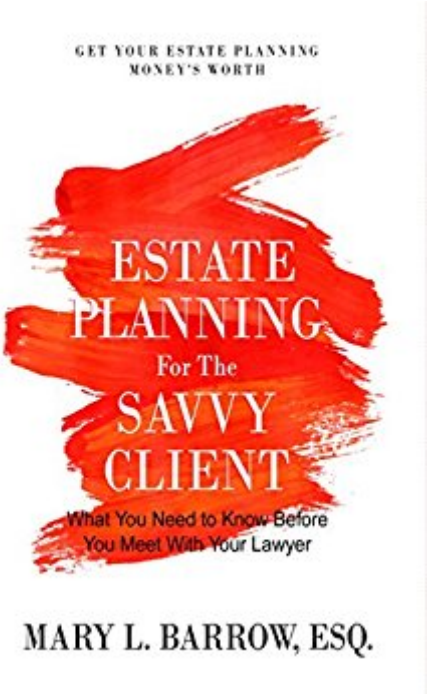
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Estate Planning For The Savvy Client: What You Need To Know Before You Meet With Your Lawyer (Savvy Client Series Book 1)



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Synopsis

Do you want to make sure that the money you spend on estate planning is money well spent?Do you have questions about estate planning, probate, wills and trusts but donÃ¢â ¬â„¢t know where to start?Or do you have an estate plan but still have unanswered questions?Would you like to be well-informed and confident before you consult a prospective attorney, or before you meet with your current attorney?With this book youÃ¢â ¬â„¢ll discover:Ã¢â ¬Â¢what you need to know to eliminate confusion about estate planning and give you a clear path to achieving your goalsÃ¢â ¬Â¢how to decide if you really need a will, revocable living trust, power of attorney, or any of the other options availableÃ¢â ¬Â¢how to choose the right attorney to help you plan your estateÃ¢â ¬Â¢how to make the most of the time spent with your attorney by having the knowledge and confidence to ask the right questionsSit down with this guide from an experienced, ivy-league-educated estate planning attorney as she answers these and other questions for you in a practical, easy-to-understand way, just as she has done for her clients and students. This book will tell you what you need to know before you meet with your attorney or prospective attorney.The Savvy Client is you!

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Customer Reviews

This book is a well written, understandable consumer guide to the estate planning process. Not a do it yourself guide, but a guide to the selection and evaluation of an estate planning attorney and the recommendations made concerning your estate plan. This is the book to read before you engage an attorney to handle the estate planning process so that you can be sure the attorney has sufficient estate planning expertise to address your particular estate planning needs. The book discusses the information your attorney needs to know about your assets in order to develop the appropriate plan. It highlights the importance of informing the attorney of your concerns regarding your particular family situation. The book contains examples of how your attorney may address those concerns with effective estate planning documents utilizing a Will, Durable Power of Attorney, Health Care Directive and beneficiary designations. It also has informative discussion of the factors to consider when determining the need for a Revocable Trust. It is indexed for convenience.

This is the perfect book to read BEFORE meeting with your attorney about any aspect of estate planning. My husband and I pride ourselves on being well informed consumers but we were struggling with the complexities of wills and trust funds. Since it is essential that we ensure our child is well provided for, we made it a priority to be better informed. Attorney Barrow’s book is clearly and concisely written, focusing on the key areas of estate planning. After reading it, we felt far more confident about selecting and meeting with our estate attorney. I think reading this book should be a prerequisite before anyone begins discussions around estate planning. You will not find another book offering more insight in such an easy to read format!

This was a great book, it made the process of estate planning simple to understand and what to look for as will explaining the terms that are used in a way that it is easy to understand. So when working with a local attorney I can be educated and be able to ensure I understand my plan and be able to participate in a more effective manner. I would highly recommend this book for anyone that is beginning stages of their Estate plan. As well as experienced person who already may have their plans done. This will explain what you have and make sure that your estate is really protected now that you understand what it should have and what to look for.

Love this book. Not only is it highly informative to clients about to embark on their personal estate

plan, it is baseline knowledge for those of us in the accounting profession who concentrate our practice in the estate and trust arena. I've had the pleasure of working with Ms. Barrow several times in my CPA practice, and this book reflects all the personal attributes that she has brought to bear with her client service: friendly, understandable, practical, on-point and effective. This book will become required reading for new professionals in our firm's estate and trust group going forward. Great job, Mary!

More than thirty years ago, as a young lawyer, I knew the importance of having a will. Accordingly, my wife and I executed simple wills leaving everything to each other, with the survivor leaving everything to our children in equal shares. Since then we have realized that this simple plan, which we thought would be suitable forever, does not address the differing needs of our children nor the disposition of those assets which wouldn't pass via the wills. This book gave me an excellent perspective on how we might change our estate plan and the various options available. An invaluable starting point for anyone contemplating an initial, or even revised, estate plan.

Attorney Mary Borrow shares her splendid wisdom is a delightful and easy to understand manner. Her vast experience is kindly shared in a way we can all understand the importance of knowing what we should be looking for when designing our estate plan and engaging an estate planning attorney. It is so helpful to have that knowledge prior to meeting with your attorney. The book is a great value especially in respect to the time saved when you do sit down with an estate planning attorney. The attorney can do a much better job for you after you have read Estate Planning for the Savvy Client and understand clearly the goals you wish to accomplish with your estate. Mary even makes the subject matter fun!

This is a good basic book to read which will help you to start collecting information needed for estate planning. It helps establish your objectives for estate planning and importance of use cases in case you don't protect your estate while you are in the right frame of mind.

ItÃƒÂ¢Ã â ¬Ã â„¢s a terrific book. Deals with the very complicated issues youÃƒÂ¢Ã â ¬Ã â„¢ll encounter when setting up a trust, but in simple language that those of us who are not lawyers can understand. I really liked her use of anecdotes to illustrate how important it is to get the wording exactly right. Also, she goes beyond issues with the trust itself to help you decide what kinds of estate documents you need and how to choose the right attorney to prepare them. After reading it, I

felt like sheÃƒÂ¢Ã â ¬Ã â„¢d made good on her assurance that it would help me have ÃƒÂ¢Ã â ¬Ã Å“the knowledge and confidence to ask the right questionsÃƒÂ¢Ã â ¬Ã Â• when I met with an attorney.

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