

2019 FIELD GUIDE

ESTATE & RETIREMENT PLANNING, BUSINESS PLANNING & EMPLOYEE BENEFITS

- Illustrated Sales Tools & Concepts
- Planning Pointers and Charts • Terms & Concepts
- Checklists • Statistics • Tables

Randy L. Zipse, J.D., AEP® (Distinguished)
Donald F. Cady, J.D., LL.M., CLU®, Author Emeritus

Field Guide To Estate Planning Business Planning And Employee Benefits 4th Ed

Donald F. Cady



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subjects of estate and retirement planning business planning and employee benefits Numerous drawings and charts to assist readers in identifying and understanding many of the concepts most frequently encountered when working with clients and other professionals Cross references to 2020 editions of Tax Facts on Insurance Employee Benefits and Social Security Medicare Facts Baseline information needed to prepare an analysis and proposal for your client Information Required For Analysis Proposal and extensive footnotes to support further research needs Terms concepts with expanded discussions of the materials previously referred to in the text and footnotes And more New in the 2020 Edition Updated asset protection strategies New information on Employer owned Life Insurance EOLI and insurance strategies for key employees Updated information on state inheritance taxes by jurisdiction New section on IRA inheritance planning Updated education planning strategies Newly revised information on estate tax deferral strategies under Section 6166 Updated DOL and SEC fiduciary rules New information covering nonqualified executive benefits Topics Covered Estate gift and income tax planning strategies Business valuations and transfers Employee compensation and benefit planning Asset protection strategies Insurance products and risk management techniques Social Security Medicare and Medicaid eligibility and benefits Fringe benefits Trust structures and trust planning Corporations and pass through entities And More See the Table of Contents section for a full list of topics Catalog of Copyright Entries, Third Series Library of Congress. Copyright Office,1975

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