



Organizing Your Estate: How to Purge & Direct Property Transfer to Chosen Family Members by Gift, Bequest, or in Trust While Thinkingly Alive (Series 300: Retirees & Estates)

Holmes F. Crouch

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In an effort to provide foresight when preparing an estate to pass onto heirs, this guidebook details how to ensure organization of estate affairs, maintain control, and avoid excessive professional fees. With comprehensive explanations and approachable language, chapters focus on inventory and appraisal, probate avoidance, the slimming of portfolio assets, and comparisons of wills and trusts. Navigating the intricacies of Form 706 (the death tax return form) with listings, by death year, of gross estate values requiring the form, this sourcebook is an ideal companion for those looking to set an estate in order. A chapter explaining the ever-changing regulations surrounding tax-free gifts to heirs is also included.

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