

Manning On Estate Planning

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JEROME A. MANNING draws on more than fifty years of estate plan-ning practice. Since 1961 he has been with the New York City law firm of Stroock & Stroock & Lavan LLP, where he is currently Of Counsel. Mr. Manning was an adjunct professor with NYU School of Law for forty years, teaching estate planning for the last twenty-five years.

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PROVIDED IS STRICTLY CONFIDENTIAL . For efficiency in planning, please bring with you each of the following: ? Any existing Wills and Codicils, Trusts, and other estate planning documents.

Your Guide to Estate Planning is not intended or written as legal or tax advice, nor are the authors authorized to give such advice. Nothing is intended or written to be used, and cannot be used by any other person, for the purpose of (i) avoiding any tax penalties or (ii) promoting, marketing, or recommending to any other person any transaction or matter addressed herein.

Page 3 of 7 – ESTATE PLANNING WORKSHEET Age for Family Trust to Terminate: _____ (22 or 25 are common ages depending upon the size of your estate and whether you anticipate graduate school.) 3. Trustee: Please list, in order of preference, who you would like to serve as Trustee of any trusts.

20. Examine all policies of insurance on real estate and personal property. Administer the Estate 21. Collect all income, receivables, and other moneys due to the decedent or estate. 22. Review estate securities, and analyze market and investment trends; keep a detailed record of all income, expenses, and estate transactions. 23.

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estate planning so that you can better understand what's involved. You'll learn more about:

- Sizing up your estate.
- Tax laws that affect your estate.
- The documents you'll need.
- Some common estate plan designs.
- How your assets will transfer when you die.
- Designating beneficiaries.
- How to get started on your plan.

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Manning Estate statistics and form. View results and future entries as well as statistics by course, race type and prize money. Manning Estate | Race Record & Form | Racing Post 1 Plasdraw Road, Aberdare, Mid Glamorgan. £395,000.

estate planning and need someone they can refer business to n(and vice-versa) 2 d) Friends and family - great source of business, even if it is only to get experience in preparing estate planning documents and future referrals 2. Proactive Sources a) Teaching/lecturing

Understanding estate planning This guide can help you prepare for

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working with your estate planning attorney to develop or update your estate plan. Preparing or updating an estate plan, including a will, power of attorney and advance medical directive (and, perhaps, a revocable trust), is a legal

Estate planning is setting goals and objectives and developing strategies for disposing of assets and providing for family members, friends, and charities at death. Estate planning is a part of financial planning because estate planning goals, objectives, and strategies directly affect the financial planning process during life.

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Contrary to this belief, estate planning isn't only for the rich or privileged. You don't need to have a multimillion-dollar home, a valuable art collection, or a large IRA to pass on in order to qualify for an estate plan. Anyone with an estate plan is likely to live a less complicated life than those without it.

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