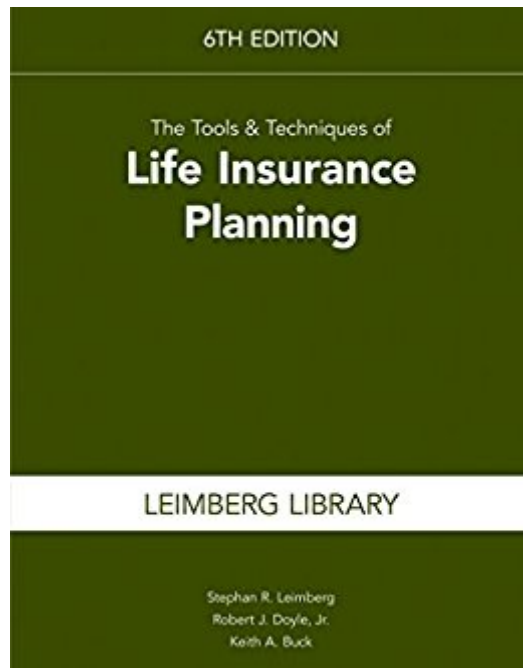


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# The Tools & Techniques Of Life Insurance Planning



## Synopsis

The insurance industry has become more and more creative in developing policies that are flexible enough to meet consumers'™ needs while maintaining a reasonable cost. As a result, insurance and financial advisory professionals must stay current with the newest techniques and latest tools that have emerged. The expert authors of *The Tools & Techniques of Life Insurance Planning*, 6th Edition, have delivered a resource that helps you do just that. It delivers:

- » Detailed information about the entire range of life insurance products that can be used by estate and financial planners in a wide variety of circumstances
- » Planning techniques for retirement income needs, estate and gift tax avoidance, estate liquidity needs, and long-term care planning
- » Plain-language descriptions of the tax consequences of various life insurance products and strategies that plans can use to minimize tax liabilities
- » Planning techniques for individuals and businesses, including key personnel policies and buy-sell agreements
- » Coverage of advanced topics, such as 103 exchanges, the transfer-for-value rule, and the use of life insurance products for charitable gift planning

*The Tools & Techniques of Life Insurance Planning*, 6th Edition, Delivers the Expert Insight and the Tools You Need to Utilize Life Insurance in the Most Effective Ways

This latest edition includes new and expanded coverage of:

- » Strategies for life insurance planning that take into account higher tax rates and the new Net Investment Income Tax
- » Expert advice on how to modify existing life insurance plans in light of recent changes to portability rules and the increased estate tax exemptions
- » Updates on DOMA/same-sex marriage issues and their effect on life insurance planning for new and existing clients
- » Insight into how state-level changes to dynasty trusts and the Rule against Perpetuities (RAP) affect life insurance planning
- » Enhanced buy-sell agreement strategies
- » Information about entity redemption as a technique for providing estate tax liquidity

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## Customer Reviews

Life insurance planning is a very complicated issue. Most people think that is just a matter of buying an insurance from an agent, but there are many other considerations like: survivors needs, estate tax issues, compensation and benefits, business succession and wealth transfer. The Tools & Techniques of Life Insurance Planning is the best guide for any insurance or financial planning professional. Also is very easy to understand for today consumers.

Shipment came faster than promised, I ordered close to start of class and was relieved about that. As far as the actual reading of the text, it's pretty dry and easy to get bored, but that's typical of these types of books. Insurance isn't exciting!

Good condition

The product is in good condition. It took a little while to get to me, but still got here before the "estimated arrival" of a month later. Exactly what I wanted, I'm happy with my purchase.

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