



2013 Field Guide to Estate Planning, Business Planning & Employee Benefits

Donald Cady, J.D. LL.M., CLU

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2013 Field Guide to Estate Planning is the resource no agent, producer, manager, or financial planner should go without. It supplies the concepts, techniques, analysis, illustrations and authoritative guidance used in estate planning, business planning and employee benefits planning.

Make the clearest presentations to clients based on current data, laws and policies

Engage and educate clients with easy-to-understand illustrations that present concepts simply and understandably

Speed your own research and preparation using handy checklists, cross references and summaries

The 2013 edition of Field Guide to Estate Planning, Business Planning & Employee Benefits is updated with these key updates and enhancements:

New terms and concepts: Spousal Lifetime Access Trust; Reciprocal Trust Doctrine; Valuation of Life Insurance; and Top-Hat Plan

Reflects the provisions of the American Taxpayer Relief Act of 2012

Updated retirement plan contribution limitations and inflation and retirement longevity figures


Current facts about the cost of rearing a child

Traditional and ROTH IRA phase-out limits

Plus, it is fully cross referenced to the 2013 editions of Tax Facts on Insurance & Employee Benefits and Tax Facts on Investments.

Authored by Donald Cady, J.D., LL.M., CLU, Field Guide to Estate Planning, Business Planning & Employee Benefits reflects his expertise and ease in communicating planning concepts and techniques to financial professionals of all levels.

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