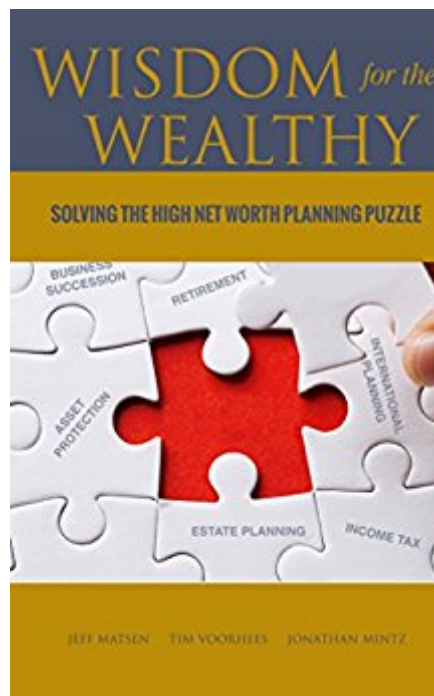




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Wisdom For The Wealthy: Solving The High Net Worth Planning Puzzle



Synopsis

People of wealth and affluence have exercised wisdom in building up their assets and some financial security. Now the challenge to protect the wealth from taxes and creditors while maximizing after-tax assets available to fund lifestyle needs, transfers to family, and/or gifts to favorite charities. *Wisdom for the Wealthy* provides ideas, strategies and planning tips for putting all the pieces of the high-net-worth puzzle together and making your visions and financial goals a reality. Practical and cutting-edge designs are set forth in easy-to-understand terms and strategies. Wisdom is the name of the game. Buy this book and solve the puzzle!

Book Information

File Size: 5269 KB

Print Length: 147 pages

Simultaneous Device Usage: Unlimited

Publisher: Crescendo Publishing LLC. (December 7, 2015)

Publication Date: December 7, 2015

Sold by:Â Digital Services LLC

Language: English

ASIN: B0193WJQ8C

Text-to-Speech: Enabled

X-Ray: Not Enabled

Word Wise: Enabled

Lending: Not Enabled

Screen Reader: Supported

Enhanced Typesetting: Enabled

Best Sellers Rank: #164,538 Paid in Kindle Store (See Top 100 Paid in Kindle Store) #4 inÂ Kindle Store > Kindle eBooks > Law > Law Practice > Legal Services #9 inÂ Books > Law > Law Practice > Legal Services #20 inÂ Kindle Store > Kindle eBooks > Law > Taxation

Customer Reviews

I found this book to be very helpful. Mr Matsen and his co-authors do a great job of explaining their 'wisdom for the wealthy' and I appreciate the knowledge they have shared. It is an informative and worthwhile read!

Mr. Matsen and associates have produced a terrific tool to help navigate the complex world of

wealth management. The book is easy to read, with lots of stories that bring the issues to life and helped me get motivated to do some estate planning. For example, one section calls the estate tax a "voluntary" tax because there are ways to avoid it--and it then describes the ways to do so in a way that non-lawyers can understand. Life goes by too quickly and we often let the urgent crowd out the important--and managing one's asset to the benefit of the family is often left undone. I highly recommend this well-written book.

Jeff, Tim and Jonathan have written a wonderful book that is a roadmap for anyone interested in protecting their assets and saving estate and income taxes. We have been clients for many years and have appreciated their experience, expertise and wisdom in this otherwise complex arena. The result has been that they have been creative in optimizing the many asset protection and estate vehicles with the objective being the future financial benefit of our family. This book is creatively illustrated and easy to understand. We highly recommend it. John Spiezia, President, JR Capital Group

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