



The Complete Guide to Organizing Your Records for Estate Planning: Step-by-Step Instructions

By John N Peragine Jr.

Download now

Read Online ➔

The Complete Guide to Organizing Your Records for Estate Planning: Step-by-Step Instructions By John N Peragine Jr.

Planning your estate is a long, complicated process that requires much time and effort. The process of organizing your records for estate planning is equally time consuming and complex. Hiring an attorney to assist you may cost more than you are willing to spend. With the help of *The Complete Guide to Organizing Your Records for Estate Planning*, you can not only take charge of your estate planning documentation, but also save time, money, and effort.

In this new book, you will learn how to find an organizational system that works for you, where to look for records, what to record, who to tell, where to keep records, and how often to update your records. You will also find information on creating a will or a living will, setting up a trust, assigning power of attorney, and filling out health care directives.

Additionally, you will learn about the documents that should be included in your estate plan, such as insurance policies, Social Security cards, birth certificates of minor children, stock brokerage statements, credit card numbers and statements, certificates of deposit, real estate deeds, mortgage statements, retirement account savings, non-retirement account savings, and current bank statements. The CD-ROM is filled with sample documents and worksheets, as well as a checklist of often overlooked information, including any medications you take, where you worked, where your savings and checking accounts are located, where your car title is located, what your funeral plans or wishes are, and who should receive what.

The Complete Guide to Organizing Your Records for Estate Planning will help you prepare your documents and record your final instructions and wishes. By using the information provided in this book you will save money you might otherwise have spent on legal and accounting fees. In addition, you will save your family the frustration of searching for these documents if something should ever happen to you. This book, written in an easy-to-understand language, will walk you through the process of organizing your records and make the process

much easier for you and your family. The companion CD-ROM is included with the print version of this book; however is not available for download with the electronic version. It may be obtained separately by contacting Atlantic Publishing Group at sales@atlantic-pub.com

Atlantic Publishing is a small, independent publishing company based in Ocala, Florida. Founded over twenty years ago in the company president's garage, Atlantic Publishing has grown to become a renowned resource for non-fiction books. Today, over 450 titles are in print covering subjects such as small business, healthy living, management, finance, careers, and real estate. Atlantic Publishing prides itself on producing award winning, high-quality manuals that give readers up-to-date, pertinent information, real-world examples, and case studies with expert advice. Every book has resources, contact information, and web sites of the products or companies discussed.

 [Download The Complete Guide to Organizing Your Records for ...pdf](#)

 [Read Online The Complete Guide to Organizing Your Records fo ...pdf](#)

The Complete Guide to Organizing Your Records for Estate Planning: Step-by-Step Instructions

By John N Peragine Jr.

The Complete Guide to Organizing Your Records for Estate Planning: Step-by-Step Instructions By John N Peragine Jr.

Planning your estate is a long, complicated process that requires much time and effort. The process of organizing your records for estate planning is equally time consuming and complex. Hiring an attorney to assist you may cost more than you are willing to spend. With the help of *The Complete Guide to Organizing Your Records for Estate Planning*, you can not only take charge of your estate planning documentation, but also save time, money, and effort.

In this new book, you will learn how to find an organizational system that works for you, where to look for records, what to record, who to tell, where to keep records, and how often to update your records. You will also find information on creating a will or a living will, setting up a trust, assigning power of attorney, and filling out health care directives.

Additionally, you will learn about the documents that should be included in your estate plan, such as insurance policies, Social Security cards, birth certificates of minor children, stock brokerage statements, credit card numbers and statements, certificates of deposit, real estate deeds, mortgage statements, retirement account savings, non-retirement account savings, and current bank statements. The CD-ROM is filled with sample documents and worksheets, as well as a checklist of often overlooked information, including any medications you take, where you worked, where your savings and checking accounts are located, where your car title is located, what your funeral plans or wishes are, and who should receive what.

The Complete Guide to Organizing Your Records for Estate Planning will help you prepare your documents and record your final instructions and wishes. By using the information provided in this book you will save money you might otherwise have spent on legal and accounting fees. In addition, you will save your family the frustration of searching for these documents if something should ever happen to you. This book, written in an easy-to-understand language, will walk you through the process of organizing your records and make the process much easier for you and your family. The companion CD-ROM is included with the print version of this book; however is not available for download with the electronic version. It may be obtained separately by contacting Atlantic Publishing Group at sales@atlantic-pub.com

Atlantic Publishing is a small, independent publishing company based in Ocala, Florida. Founded over twenty years ago in the company president's garage, Atlantic Publishing has grown to become a renowned resource for non-fiction books. Today, over 450 titles are in print covering subjects such as small business, healthy living, management, finance, careers, and real estate. Atlantic Publishing prides itself on producing award winning, high-quality manuals that give readers up-to-date, pertinent information, real-world examples, and case studies with expert advice. Every book has resources, contact information, and web sites of the products or companies discussed.

The Complete Guide to Organizing Your Records for Estate Planning: Step-by-Step Instructions By John N Peragine Jr. Bibliography

- Sales Rank: #2562926 in Books
- Brand: Brand: Atlantic Publishing Group Inc.
- Published on: 2009-01-05
- Original language: English
- Number of items: 1
- Dimensions: 8.90" h x 1.00" w x 6.00" l, .95 pounds
- Binding: Paperback
- 288 pages



[Download The Complete Guide to Organizing Your Records for ...pdf](#)



[Read Online The Complete Guide to Organizing Your Records fo ...pdf](#)

Download and Read Free Online The Complete Guide to Organizing Your Records for Estate Planning: Step-by-Step Instructions By John N Peragine Jr.

Editorial Review

Review

As an estate planning attorney for 18 years, I witnessed numerous families struggle with the death of a loved one. The primary pain is loss, but that emotion can be eased by gratitude for the well-organized estate or enhanced by frustration for the financial chaos some people leave their loved ones. I had cases where the only way the executor or trustee learned of accounts and insurance policies was by waiting for statements in the mail. More than a few families have had to sort through hundreds of files of needless information to find a Will, an insurance policy, or a designation form. New clients often told me that they had an awful experience with the administration of a parent's estate and that they were hiring me to prevent doing the same thing to their children. The Complete Guide to Organizing Your Records for Estate Planning: Step-by-Step Instructions by John Peragine describes every aspect of organizing financial, family, and health care matters. What can feel like a daunting task is broken down into easily achievable steps that will leave you, and your family, with a roadmap of your wishes. An estate planning attorney, accountant, and financial planner can help with the complex analysis of a plan, but they are not there in your home arranging your documents; that is your responsibility. This book is an excellent tool for giving your family and beneficiaries the gift of clarity of your wishes and ease of administration. The sooner you start this process, the better. One advantage to starting relatively early in life is, generally, there is less financial information to organize and updating becomes a habit. Moreover, as John Peragine discusses in the first chapter, death will come to everyone and no one knows when. Particularly with regard to your health care decisions, clearly stating your wishes and appointing someone to direct them is imperative at every age because accidents happen. Sensitive health care matters become an issue when direction is absent, leaving the family, doctors, and sometimes a judge trying to determine your wishes. For many people, seeing an attorney to document their estate plan will be necessary. As a former attorney, I found this book very helpful. First, estate planners will ask about your assets and their value, and after completing your portfolio, you will be able to accurately provide this information. Second, I found that most clients are not aware of estate planning options and terminology and can become overwhelmed by all of the information discussed in the first meeting. This book gives an introduction to estate planning topics, so hopefully, the first attorney meeting will not feel quite as daunting. Third, the book contains various suggestions for including personal messages and information. These mementos can be very meaningful to family and friends, but an attorney generally is not the appropriate person to consult in these matters. Setting up a portfolio, as John Peragine describes, will be one of the last gifts you can leave your family, and in my experience, it will be one received with tremendous gratitude. -- Kim L. Allen-Niesen, Esq.

Users Review

From reader reviews:

Sophia Myers:

What do you about book? It is not important along? Or just adding material when you need something to explain what the ones you have problem? How about your free time? Or are you busy particular person? If you don't have spare time to complete others business, it is make you feel bored faster. And you have time? What did you do? Every individual has many questions above. They must answer that question due to the fact just their can do in which. It said that about e-book. Book is familiar on every person. Yes, it is suitable. Because start from on guardería until university need this particular The Complete Guide to Organizing Your

Records for Estate Planning: Step-by-Step Instructions to read.

Theo Garcia:

The experience that you get from The Complete Guide to Organizing Your Records for Estate Planning: Step-by-Step Instructions could be the more deep you searching the information that hide in the words the more you get enthusiastic about reading it. It does not mean that this book is hard to recognise but The Complete Guide to Organizing Your Records for Estate Planning: Step-by-Step Instructions giving you thrill feeling of reading. The writer conveys their point in certain way that can be understood simply by anyone who read it because the author of this publication is well-known enough. This kind of book also makes your vocabulary increase well. Making it easy to understand then can go together with you, both in printed or e-book style are available. We propose you for having that The Complete Guide to Organizing Your Records for Estate Planning: Step-by-Step Instructions instantly.

William Kozak:

Reading a book tends to be new life style in this era globalization. With reading you can get a lot of information that may give you benefit in your life. Having book everyone in this world may share their idea. Books can also inspire a lot of people. Plenty of author can inspire their reader with their story or their experience. Not only the storyline that share in the textbooks. But also they write about the information about something that you need example. How to get the good score toefl, or how to teach your young ones, there are many kinds of book which exist now. The authors on this planet always try to improve their ability in writing, they also doing some research before they write for their book. One of them is this The Complete Guide to Organizing Your Records for Estate Planning: Step-by-Step Instructions.

Doris Stone:

What is your hobby? Have you heard that will question when you got scholars? We believe that that question was given by teacher to their students. Many kinds of hobby, Everyone has different hobby. And you know that little person such as reading or as looking at become their hobby. You need to understand that reading is very important and also book as to be the factor. Book is important thing to increase you knowledge, except your own personal teacher or lecturer. You will find good news or update regarding something by book. Many kinds of books that can you decide to try be your object. One of them is The Complete Guide to Organizing Your Records for Estate Planning: Step-by-Step Instructions.

Download and Read Online The Complete Guide to Organizing Your Records for Estate Planning: Step-by-Step Instructions By John N Peragine Jr. #G2NJPLWFA5R

Read The Complete Guide to Organizing Your Records for Estate Planning: Step-by-Step Instructions By John N Peragine Jr. for online ebook

The Complete Guide to Organizing Your Records for Estate Planning: Step-by-Step Instructions By John N Peragine Jr. Free PDF d0wnl0ad, audio books, books to read, good books to read, cheap books, good books, online books, books online, book reviews epub, read books online, books to read online, online library, greatbooks to read, PDF best books to read, top books to read The Complete Guide to Organizing Your Records for Estate Planning: Step-by-Step Instructions By John N Peragine Jr. books to read online.

Online The Complete Guide to Organizing Your Records for Estate Planning: Step-by-Step Instructions By John N Peragine Jr. ebook PDF download

The Complete Guide to Organizing Your Records for Estate Planning: Step-by-Step Instructions By John N Peragine Jr. Doc

The Complete Guide to Organizing Your Records for Estate Planning: Step-by-Step Instructions By John N Peragine Jr. Mobipocket

The Complete Guide to Organizing Your Records for Estate Planning: Step-by-Step Instructions By John N Peragine Jr. EPub

G2NJPLWFA5R: The Complete Guide to Organizing Your Records for Estate Planning: Step-by-Step Instructions By John N Peragine Jr.