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Tax Smart Investing Maximizing Your Clients Profits

Marc J. Lane



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Tax-Smart Investing Andrew D. Westhem, 1999-06-07 In Tax Smart Investing you will find an invaluable ally to help you guide your clients through the minefield of tax consequences of a wide range of investment vehicles Investment professionals Andrew Westhem and Stewart Weissman reveal the tax traps that can snare the unwary and describe the sophisticated tactics they have developed to elude those traps Written in a clear straightforward style and packed with practical examples Tax Smart Investing is an indispensable guide for investment advisors financial planners accountants and attorneys

Keeping Clients for Life Karen Caplan Altfest, 2001-07-02 A successful financial planner is someone who does more than just crunch numbers and present an annual investment plan to clients There is a psychological component to effective client care as well as to issues involving clients overall financial well being People skills as well as financial planning skills are necessary to build a successful financial planning business This comprehensive guide teaches both new and veteran financial professionals how to relate to their clients in meaningful ways thus growing their business by increasing the long term retention of those clients Offered here are insights into such issues as how to determine which clients to accept how to propose a plan clients can use how to tread carefully in family situations how to develop sensitivity and communications skills and how to work with the media and recognize the importance of building your business one lasting relationship at a time Karen Caplan Altfest PhD CFP New York NY is Vice President of L J Altfest Co a financial planning and investment management firm She is also the Director of the Financial Planning and Investments Program at the New School **J.K.**

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Entrepreneurs Marc J. Lane, 2002-03-25 This valuable book helps financial advisors address the needs of their entrepreneurial clients Most people opening their own businesses are experts in their fields But when it comes to the vital intricacies of running a successful business many entrepreneurs find themselves struggling to survive With more and more

people starting their own small businesses a growing need has developed for expert guidance to help today's entrepreneurs face their new legal tax and financial challenges. Advising Entrepreneurs helps financial advisors address the special needs of their entrepreneurial clients. It provides a comprehensive approach to growing wealth shielding business assets from liabilities lowering taxes and much more by promoting prudent risk taking. Marc Lane, Chicago, IL, is a business and tax attorney. He is a Master Registered Financial Planner, Registered Financial Consultant, and Certified Investment Specialist. He has authored thirty books, is an Adjunct Professor of Business at the University of Illinois College of Business Administration's Institute for Entrepreneurial Studies, and an Adjunct Professor of Law at Northwestern University.

Fee-Only Financial Planning John E. Sestina, 2002-02-28. J.K. Lasser Pro™ Before You Plan, Consult J.K. Lasser Innovative Planning That Benefits Professionals and Clients. What does it take to be a successful fee-only financial planner? According to John Sestina, acclaimed father of fee-only financial planning, the only special qualifications are a genuine desire to help people, an ability to listen, and a commitment to lifelong learning. Fee-Only Financial Planning introduces financial planners to the newest, fastest growing niche in the financial planning field: fee-for-service rather than commission-based planning. Fee-only planning is attractive to the growing number of clients who want to avoid the long-term payments, lack of objectivity, limited choices, or conflict of interest that can occur with a commission-based payment structure. In his comprehensive, how-to guide and easy-to-use reference, John Sestina provides in-depth coverage of the financial planning field. He covers such topics as: The advantages and disadvantages of fee-only planning for both client and planner; Making the transition from commission-based to fee-based planning; Building a profitable practice with varied client bases; Tailoring to your own work style; the system Sestina developed over 35 years of successful private practice; Developing and maintaining productive client relationships. For professionals wondering whether fee-only financial planning is in their future, or for anyone in financial services who wants to stay current, Fee-Only Financial Planning is an eye-opening introduction to one of the financial world's freshest, richest entrepreneurial careers.

J.K. Lasser Pro Survival Skills in Financial Services Julian Lowenthal, 2002-10-29. The financial services industry is constantly changing and you need to respond. Change is a constant in the financial services industry. FSI The question is: What should you do to survive? Whether you work in or sell to the industry, you'll benefit from the in-depth insight, professional knowledge, and practical tools found in J.K. Lasser Pro Survival Skills in Financial Services. Advanced Praise for J.K. Lasser Pro Survival Skills in Financial Services: The challenges of surviving and succeeding in the financial services industry have never been greater. J.K. Lasser Pro Survival Skills in Financial Services provides a practical guide to dealing with the tough realities of change. The result is an enjoyable, down-to-earth and interactive resource that provides the knowledge, skills, and human understanding to deal with the forces of change. Keith T. Darcy, Executive Vice President, IBJ Whitehall Bank Trust Company. This book will help my staff work through the most difficult transition in the financial services industry. Julian speaks in a non-technical, light-handed style to every member of my staff. He draws on his

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well as creating a Power of Attorney and Health Care Proxy Annual Exclusion and Exemption Equivalent Planning Irrevocable Life Insurance Trusts and Crummey Notices Charitable Remainder Trusts and Foundations Family Limited Partnerships Business Succession Planning Techniques Split Dollar Plans Section 529 education plans Retirement distribution rules Self Canceling Installment Notes Intentionally Defective Grantor Trusts GRITs GRATs and GRUTs And this is just a sampling of the expertise that the authors provide in a truly unique and understandable text J K Lasser Pro Estate and Business Succession Planning Second Edition contains all you need to make the most of the new tax law while navigating this complex area and shows you how to protect and provide for loved ones for generations to come Please visit our Web site at www.jklasser.com *Estate and Business Succession Planning* Russell J. Fishkind, Robert C. Kautz, 2001-06-15 Written by two attorneys who specialize in estate planning this book clarifies all the issues involved in planning an estate and transferring wealth It offers comprehensive estate planning guidelines including creating a will designating power of attorney trusts and life insurance and includes up to date estate and inheritance tax information **Advising the 60+ Investor** Darlene Smith, Dale Pulliam, 1999-06-09 Advising the 60 Investor offers tax and financial planners an authoritative resource for the financial concerns of those who have retired or are about to retire Drawing on the combined expertise of tax finance and accounting professionals this book makes it easier for financial advisors to present their clients with a full range of planning strategies and to provide practical advice custom tailored to their clients individual circumstances An abundance of detailed real world examples illustrate many of the most common financial situations faced by older investors and handy computation aids and data tables make calculations clear quick and straightforward *Managing Family Trusts* Rob Rikoon, 1999-07-12 Managing Family Trusts is an uncompromising nuts and bolts guide to the world of family trusts Written by a seasoned expert with many years of firsthand experience in the field it describes how financial professionals can help beneficiaries loosen the grip of unresponsive or inefficient trustees assert their rights as inheritors and assume greater responsibility for their own financial lives Managing Family Trusts provides a complete set of tools to all those concerned with the business of building better more satisfying fiduciary arrangements and presents a rare insider s view of how this world operates and details its unique challenges and rewards *Wealthbuilding* Kurt Rosentreter, 2009-07-15 Rosentreter a senior financial advisor and insurance agent at a major financial services firm in Toronto presents a personal finance guide tailored to Canadians **J.K. Lasser Pro New Strategies for College Funding** Raymond D. Loewe, KC. Dempster, 2002 A PROFESSIONAL GUIDE TO PLANNING FOR COLLEGE FUNDING A properly designed college savings plan is key to providing a college education as well as the best way to avoid any surprises Yet many parents fail to realize how much time money and commitment are needed to accomplish this goal As an advisor you must guide your clients through this process with poise and confidence and J K Lasser Pro New Strategies for College Funding An Advisor s Guide with its companion CD ROM will help you do just that Filled with expert advice real world case studies and invaluable tools techniques worksheets

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estate Using real estate IRAs you can combine the tax benefits of retirement funds with the high rates of appreciation in the real estate market growing your retirement investments by leaps and bounds This handy book shows you how Investing For Dummies Eric Tyson,2005-11-14 Do you have a few investments that you would like to develop into a full investment plan Would you like to know how to strengthen your portfolio Perhaps you want to roll your 401 k into a new plan Whatever your agenda is nowadays it s hard to find good advice on where to invest your money Now you ll have the ultimate one stop no nonsense guide to investing with Investing for Dummies Fourth Edition This updated bestseller provides fresh data and analysis on where to put your money and how to improve returns on IRAs and 401 k s as well as investing fundamentals like examining your investment options and considering risks and returns You ll have all the tools you need to Investigate and purchase individual stocks Buy bonds and other lending investments Select the right mutual fund Invest in the best stock bond and money market funds Choose a worthy brokerage firm Know when to invest in real estate Start and run your own small business Gather a collection of reliable investment resources This handy reference is packed with tips and advice on how to conquer important investment obstacles and what to consider when selling an investment as well as how to invest in a down market With Investing for Dummies Fourth Edition you ll soon have the power to turbo charge your investment and maximize your returns

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