

A Modern Approach to Wills, Administration and Estate Planning (with Precedents): Second Edition

Christopher Whitehouse, Lesley King
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Christopher Whitehouse, Lesley King : A Modern Approach to Wills, Administration and Estate Planning (with Precedents): Second Edition before purchasing it in order to gage whether or not it would be worth my time, and all praised A Modern Approach to Wills, Administration and Estate Planning (with Precedents): Second Edition:

0 of 0 people found the following review helpful. The tax-efficient way....By Phillip Taylor

MBE[[VIDEOID:mo7X6QZS78VV44]]TO TACKLE ESTATE PLANNING AND THE DRAFTING OF WILLSAn appreciation by Phillip Taylor MBE and Elizabeth Taylor of Richmond Green ChambersWills affect everybody, (well, almost everybody), for death comes to all -- and for every will there is at least one or more beneficiaries. It is fair to say, however, that the greater the value of the assets left behind to fight over, the bigger the tax burden and it is here that wills and taxation issues obviously overlap. This highly regarded work of reference therefore, is just as relevant and useful for tax advisers as it is for practitioners specialising in the administration of estates and the drafting of wills. According to the authors Christopher Whitehouse and Professor Lesley King, this new edition, published by Jordans, has ballooned in size by some forty percent compared with the first edition of 2010. This, they say, can be blamed on 'the torrent of recent case law, statutory changes in the law and the deluge of consultation papers.' They also mention the enactment of yet more anti-avoidance legislation which obviously emerges as a further obstacle to devising a tax avoidance scheme. The book therefore contains much new material which reflects changes in legislation, notably those incorporated in the Insolvency (Amendment) Rules 2010, plus new case law. In particular there are four new chapters which include notes for the will draftsman and the latest advice on, for example, gifts to charity and the reduced IHT rate... obtaining the Grant... and constituting and administering the will. In view of these numerous and recent developments, we would say that it is virtually imperative for practitioners charged with the tax-efficient drafting of wills, as well as other aspects of estate planning, to acquire this book. The book is divided into three sections A, B and C which, respectively, cover the background law... drafting the will... and finally, administering the Estate (including establishing and running will trusts). Within these broad categories, an astounding range of issues is examined, as you'll note from the minutely detailed table of contents. As the title indicates, the book is full of useful precedents, carefully chosen to supplement the narrative commentary and to meet those client needs that most commonly occur in everyday practice. The accompanying CD ROM gives lets practitioners download and adapt each document for individual client requirements. Reassuringly, there are extensive tables of cases, statutes, and statutory instruments, a table of abbreviations and two appendices which include interest rates payable on funds in court. Here then, is a solidly reliable and readable work of reference that should be kept readily to hand by every professional involved in this technically challenging and fast changing area of law.

Written by leading lawyers in the field, this book is a popular guide to the tax efficient drafting of wills, estate planning, and administration in the UK. It provides practitioners with help and guidance on everyday UK estate planning and will drafting, and it discusses the typical problems and pitfalls that may be encountered in practice. The precedents have been carefully selected to deal in a straightforward fashion with the common needs of clients. This second edition has been extensively revised and includes four new chapters. The book begins by looking at the essential legal framework of wills, trusts, and taxation through a combination of detailed and authoritative commentary, worked examples, and expertly drafted precedents. It then examines specific topics, including: transferable nil rate band * using IPDIs * provision for children * pilot trusts * gifts * APR and BPR * obtaining the grant * instruments of variation and disclaimer * constituting and administering the will * tax efficient administration * agricultural property relief/business property relief. The authors' narrative commentary is supplemented by 40 precedents which are included on an accompanying CD-ROM, allowing users to download and adapt each document as necessary.