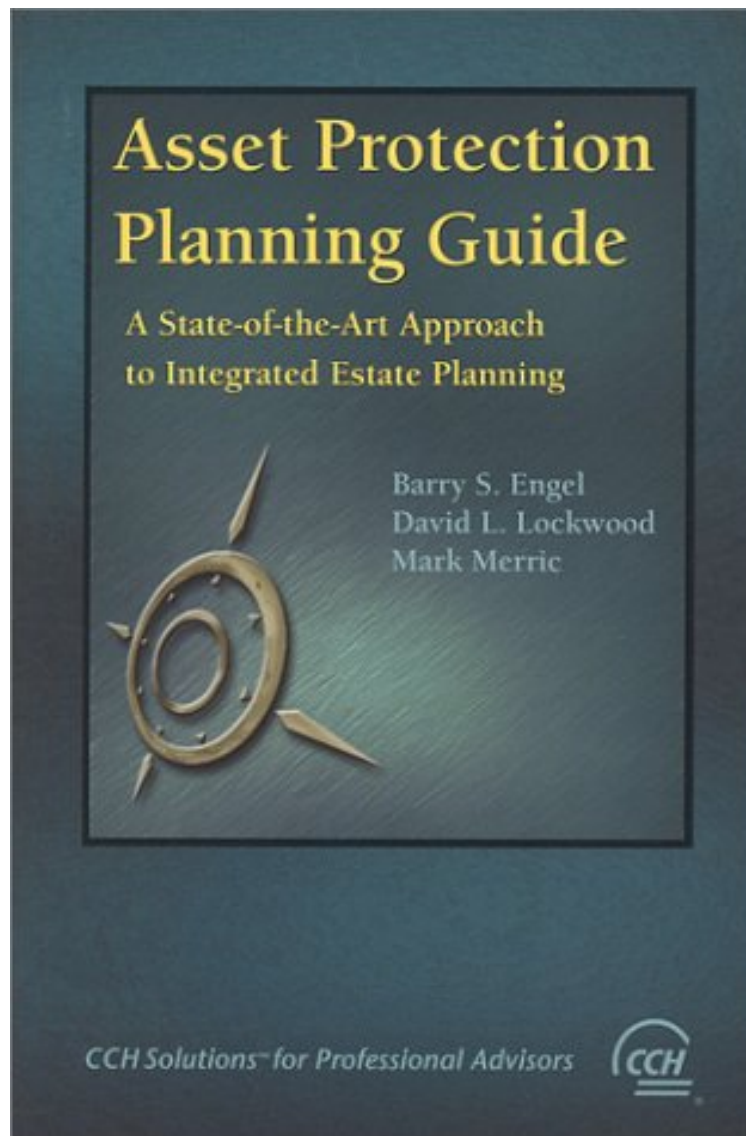


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Asset Protection Planning Guide: A State-of-the-Art Approach to Integrated Estate Planning

Barry Engel, David L. Lockwood
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Individuals or business owners with substantial property need to incorporate asset protection planning into their financial and business plans to protect that property from creditors, government agencies, third-party litigants, and, in so doing, protect the interests of heirs. Asset Protection Planning Guide helps accountants and financial advisors master the multitude of asset protection vehicles available, understand the strengths and weaknesses of those vehicles, and skillfully utilize them to achieve their clients' goals. An ideal reference for estate planning attorneys, trust officers, tax practitioners, financial planners and other wealth planners who are involved in asset protection planning, the Guide covers every aspect of the subject -- describing the various asset protection plans, when to use them, why to use them, and which countries offer the most advantageous arrangements for different situations. Specific chapters include: Asset Protection Planning and Fraudulent Transfer Law Gifting as a Planning Tool Joint or Concurrent Ownership as a Planning Tools Exemptions as a Planning Tool Foreign Annuities and Foreign Insurance Products Family Limited Partnerships as a Planning Tool Insurance as a Planning Tool Domestic Trusts as a Planning Tool Alternative Tools Under Other Legal Systems Foreign Asset Protection Trusts as a Planning Tool Expatriation as an Asset Protection Tool Protection of Retirement Benefits The Guide includes numerous practice tools, including: Engal Ladder of Asset Protection Vehicles Model Foreign Asset Protection Trust Structures Asset Protection Control/Benefit Scale Sample Documentation Language Sample Trust Agreement Sample Fee Agreement

About the AuthorBarry S. Engel of the law firm Engel Reiman Lockwood is President Emeritus, America's Branch Chair, and a Fellow of the Isle of Man-based Offshore Institute. He is also a member of of the Asset Protection Planning Committee of the American Bar Association Section of Real Property, Probate and Trust Law. He has written extensively on Asset Protection and is regularly quoted on the topic in the news media. David Lockwood, also of Engel Reiman Lockwood has served as a professor at the colleges of law at the University of Denver and the University of Oklahoma and as the Director of the Certified Financial Planning Program at the College for Financial Planning in Denver.