



Asset Protection Planning Guide, CCH Tax Spotlight Series

By J.D. Barry S. Engel



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Featuring the insights and strategies of leading asset protection strategist, Barry S. Engel, the Asset Protection Planning Guide helps advisors master the multitude of asset protection planning vehicles available, understand the strengths and weaknesses of those vehicles, and achieve the goals of clients. The ideal reference for estate planning attorneys, trust officers, tax practitioners, financial planners, and other wealth planners, the Guide covers every aspect of asset protection planning -- describing the various asset protection plans, when to use them, why specific strategies are used, and which countries to go to for protection. It describes the complex mix of tools and techniques available to the planner in designing successful, solid plans -- offering a wealth of practical advice, helpful "how-to's" and practice tools, sample documentation language, and a sample trust. This new edition reflects the most recent developments in asset protection planning. This practical resource covers every aspect of this complex area, giving users the security of knowing they'll be well informed as they help clients safeguard their assets. Topics covered include: - What Is Asset Protection Planning? - Asset Protection Planning and Fraudulent Transfer Law - Gifting as a Planning Tool - Joint or Concurrent Ownership as a Planning Tool - 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 - Ethical, Civil, and Criminal Considerations for the Asset Protection Planner The Guide includes numerous practice tools, including: the Engel Ladder of Asset Protection Vehicles, Model Foreign Asset Protection Trust Structures, Asset Protection Control/Benefit Scale, Sample Documentation Language, Sample Trust Agreement, and Sample Fee Agreement. ABOUT THE AUTHOR: Barry S. Engel is the founding principal (1984) of Engel & Reiman pc, a Denver, Colorado-based law firm having an international client base and an international reputation for excellence in asset protection planning and integrated estate planning. He has been written about and quoted by some of the publications of highest regard in the business world and in the professional world. Mr. Engel's areas of expertise in his law practice include estate planning with a view toward

the lifetime protection of the estate ("integrated estate planning"), offshore planning, conventional domestic estate planning and international estate planning. Mr. Engel and his law firm are known worldwide for their practice as concerns the asset protection component of integrated estate planning. The firm has influenced trust legislation in a number of countries around the world, and the firm's professional endeavors have revolutionized the thinking of lawyers and other wealth planners globally. This includes the adoption by various jurisdictions of statutory law designed to lend certainty to the planning concepts involved in integrated estate planning. Mr. Engel was a co-author of protective trust legislation as enacted by the Parliament of the Cook Islands in 1989, which legislation has served as a model for many other offshore jurisdictions as well as a model for onshore legislation. Mr. Engel has also consulted with a number of other foreign jurisdictions regarding similar legislation.

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Editorial Review

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