Contents

	Pregame Warm-Up	
	Or Read This Before You Read This Book	xiii
	Acknowledgments	xxi
	The First Quarter: Establishing Your Living Trust	1
Chapter 1	How You Established Your Living Trust Without a Clear Understanding of What It Is and Row It Works	
	You Don't Know What You Don't Know about Your Living Trust	3
Chapter 2	What Does the Living Trust Do, and New Does It Do It?	
	Or The Best Explanation of the Living Trust You Will Ever Get	10
Chapter 3	Do You Really Need a Living Trust?	
	Don't Let Someone Sell You Something You Don't Need	14
Chapter 4	Establishing Your Living Trust	
	No Better Way to Get Started Than to Get Started	21

Chapter 5	Who Should You Select as the Lifetime Agent of Your Living Trust?	
	Or If You Become Incapacitated, Will Your Lifetime Agent Manage Your Living Trust for Your Benefit or for His?	31
Chapter 6	You Can Select Your Children as Your After-Death Agent, but Will They Carry Out Your Living Trust's Inheritance Instructions?	
"Tho	Or It Was Our Parents' Wish, but It Ain't Our Wish"	41
L	The Second Quarter: iving with Your Living Trust during the Lifetimes of You and Your Spouse	51
Chapter 7	Functions of Your Living Trust While Both You and Your Scouse Are Alive	
	Don't Quite Forget about Your Living Trust After You Have Thrown It into Your Safe-Deposit Box	53
Chapter 8	The Five Concerns about the Real Estate You Transferred to Your Living Trust	
	Or You Still Own Your House!	65
Chapter 9	Should You Tell Your Children about Your Living Trust? Or Don't Dismiss the Chance to Have	
	a Family Inheritance Meeting—Especially If the Lawyer Won't Charge You	73

	after the Death of Your Spouse	81
Chapter 10	Will You Divert Your Deceased Spouse's Half of the Living Trust Assets from Your Offspring? Or How to Make Your Children Fret and Hope That You Will Do the Right Thing	83
Chapter 11	Spouse's Inheritance Instructions or Not! Or How to Lord It over Your Children	
	with Threats of Changing Your Living Trust	89
Chapter 12	Dealing with Your Living Trust If You Remarry Or The Battie Royal: Your Second Spouse	94
Chapter 13	Splitting the Living Trust Assets After Your Spouse Dies, Preparing Your Spouse's Estate Tax Return, and Other Tax Stuff That You Would Rather	94
	Just Ignore Or	
af	As Much as You Want to, Don't Skip This Chapter! To Prevent Estate Taxes ter Your Death, You Must Deal with Estate Tax Matters after Your Spouse's Death	99

The Third Quarter:

The Fourth Quarter: Dying with Your Living Trust	113
Chapter 14 Distribution of Your Living Trust After Both You and Your Spouse Are Dead	
The Inheritance Arena Is Not for the Fainthearted	115
Chapter 15 Don't Intentionally Leave Your Children Unequal Inheritances	
So What If One Needs It More Than the Other?	119
Chapter 16 The Accidental Unequal Inheritance	
Or If You Think You Have Treated Your Children Equally by Leaving Them Equal Inheritances, I Have Some News for You!	124
Chapter 17 Don't Make a Child Who Owes You Money a Debtor to Your Other Children	
Or An Unforgiven and Unpaid Loan to a Child Can Wreak Havoc After Your Death	131
Chapter 18 Do Not Leave Your Child an Outright	
Or I'm Not Kidding! Don't Leave Your Child an Outright Inheritance	138
Chapter 19 Using Your Living Trust to Force Your Child into a Conventional Lifestyle	
If the Twig Is Bent, Will Force Do Anything to Straighten It Out?	167

172
179
184
196
205
207

χij **Contents**

Chapter 25 A Random Sampling of Cautionary Tales from the Inheritance Arena

Read about, and Learn from, My Previous Mistakes and the Mistakes of My Clients 222

About the Author

Or

An Invitation from the Author to Contact Him at No Charge

> Index 247

243

With: Indiana specific states of the state o