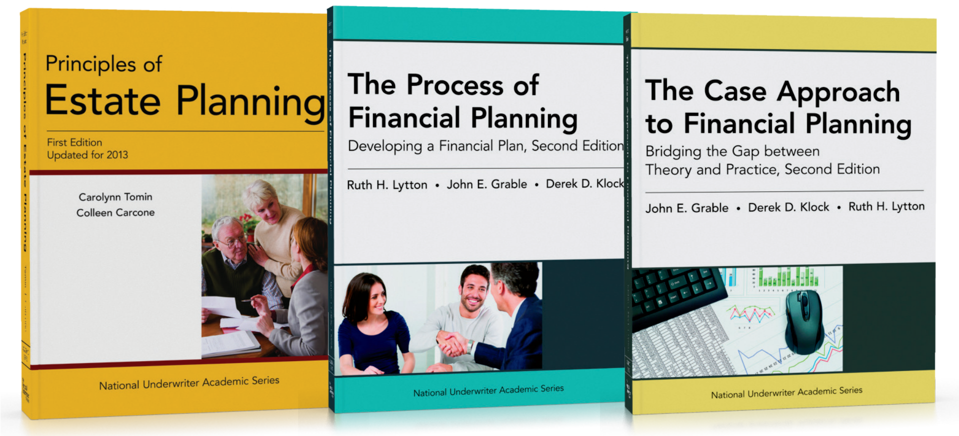
2014

National Underwriter

Academic Catalog

ACADEMIC SERIES



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Rick Kravitz
Vice President and Managing Director, Professional Publishing Division
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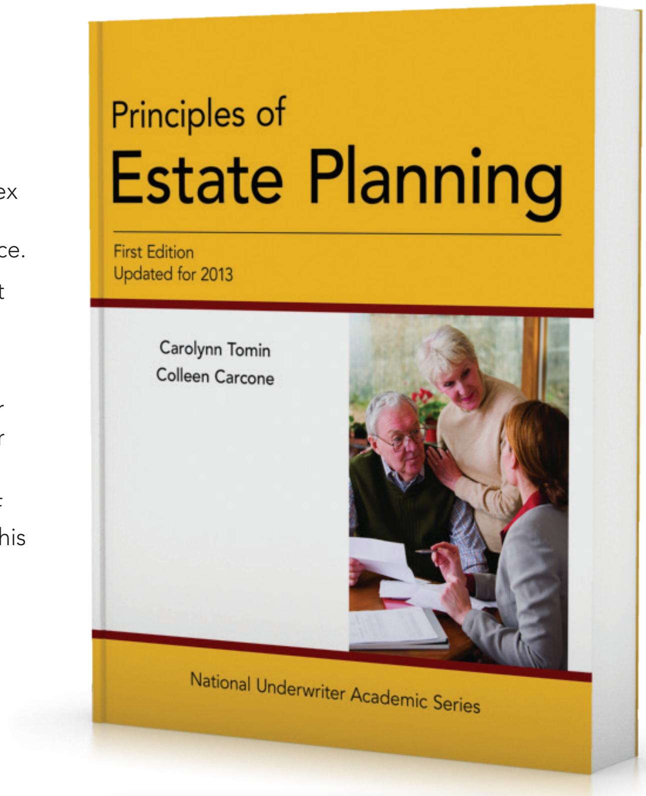
Principles of Estate Planning, 1st Edition, Updated for 2013

C. Tomin | C. Carcone



Principles of Estate Planning is written specifically to help students master the complex area of estate planning and prepare for the CFP® Certification Examination, while also presenting experience-based guidance that is directly applicable in professional practice.

This new First Edition, Updated for 2013, includes all of the most current estate and gift tax amounts and exemptions resulting from the American Taxpayer Relief Act of 2012. Amounts are updated throughout the book in the examples, practitioner tips, client situations, end-of-chapter review questions and all learning content. This textbook allows students to work with the most current information, thus helping to gain a better understanding of how to advise clients in the real-world using real numbers. Teach your students using the most up-to-date estate planning textbook on the market.

The authors, Carolynn Tomin, CFP®, and Colleen Carcone, JD, CFP®, fully address all of the CFP® Certification Examination Principal Topics for Estate Planning. In addition to this on-target approach, ***Principles of Estate Planning*** features:

- Content that is systematically organized into subtopics to help simplify the understanding and retention of complex material
- "Chapter Contents" that outline the topics addressed in each chapter
- "Learning Objectives" in each chapter that provide topic focus
- "Client Situations" that present practice scenarios and illustrate the practical application of key concepts in client situations
- "Practitioner Tips" that provide practical advice and guidance
- "Practice Standards" that highlight the related steps in the financial planning process from CFP Board's "Standards of Professional Conduct"
- Chapter summaries, key terms, and review questions that aid students in recall, retention, and review of the topics
- And much more!

NEW 2014 Supplement Coming Soon!

"From the Preface: Our objective is not only to explain the topics in great detail but to emphasize their practical application in financial planning situations and in the context of a comprehensive financial plan. Each topic is broken down into smaller components and illustrated with client situations to reinforce the concepts and facilitate the reader's learning experience."

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Product # 9110001 • Pub Date: August 2013
ISBN: 978-1-939829-57-3 • Format: Paperback, 8½"x11"
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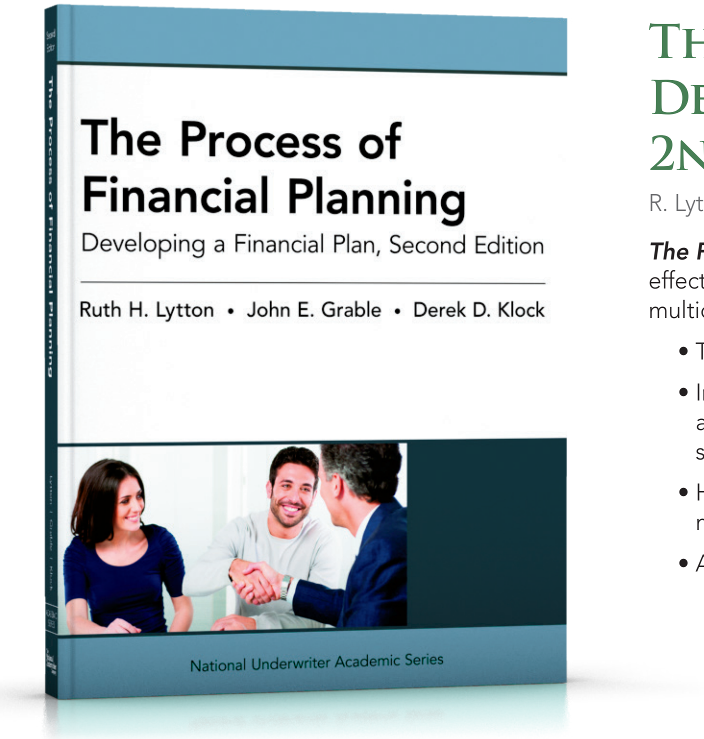

THE PROCESS OF FINANCIAL PLANNING: DEVELOPING A FINANCIAL PLAN, 2ND EDITION

R. Lytton | J. Grable | D. Klock

The Process of Financial Planning: Developing a Financial Plan, Second Edition, effectively emphasizes the process of financial planning, based on in-depth and multidisciplinary views.

- Through the process, creates a framework for the practice of financial planning.
- Introduces concepts central to both the profession and practice: the ethical, legal, and regulatory environments; planner-client communication; and the development of specific skill sets, such as decision making and analysis.
- Highlights the components of a model financial plan, both comprehensive and modular, to document and guide the process for the advisor and the client.
- And, new and expanded for the Second Edition:
  - Increased focus on CFP Board's Practice Standards, Code of Ethics, and Rules of Conduct
  - Expanded teaching and learning aids to help students focus on and retain key information
  - Updated and expanded appendices and revised sample plan section—education planning
  - New and expanded instructor aids and materials
  - And much more!

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Chapter 6 Framing the Relationship, the Situation, and the Goals

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Product # 7190002 • Pub Date: August 2012
ISBN: 978-1-936362-98-1 • Format: Paperback, 8½"x11"
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The Process of Financial Planning, 2nd Edition, and The Case Approach to Financial Planning, 2nd Edition

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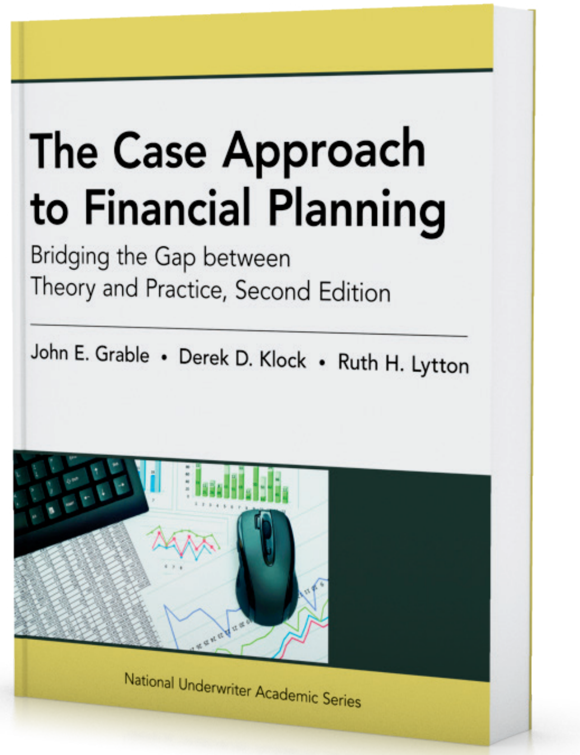
The Case Approach to Financial Planning: Bridging the Gap Between Theory and Practice, 2nd Edition

J. Grable | D. Klock | R. Lytton



The text features:

- A content review of all of the major subject areas in the financial planning curriculum
- A variety of case studies:
  - The Bedo Family Case serves as the foundation for writing a comprehensive financial plan. Questions and discussions run through the entire book.
  - Chapter-based case examples illustrate how financial planning recommendations are developed to help clients meet goals and objectives.
  - End-of-chapter mini-cases and questions challenge students to apply content.
  - Quantitative/analytical mini-cases feature multiple-choice questions and answers, designed to develop a student's ability to analyze, evaluate, and synthesize strategies to create appropriate recommendations matched to the clients.
  - A separate ethics case tests knowledge of securities rules and financial planning practice standards.
- The Financial Facilitator, an integrated Excel financial planning spreadsheet package, "facilitates" analysis and frees the student to creatively model and develop planning strategies and recommendations
- Chapter-based learning aids help focus and retention of key information
- And, new to the Second Edition: new and revised instructors' materials and student aids, revised and updated content including PPACA health care and "Planning for Special Populations" featured in every chapter, new and expanded cases, and new "fillable" forms for use with cases

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Product # 7200002 • Pub Date: August 2012
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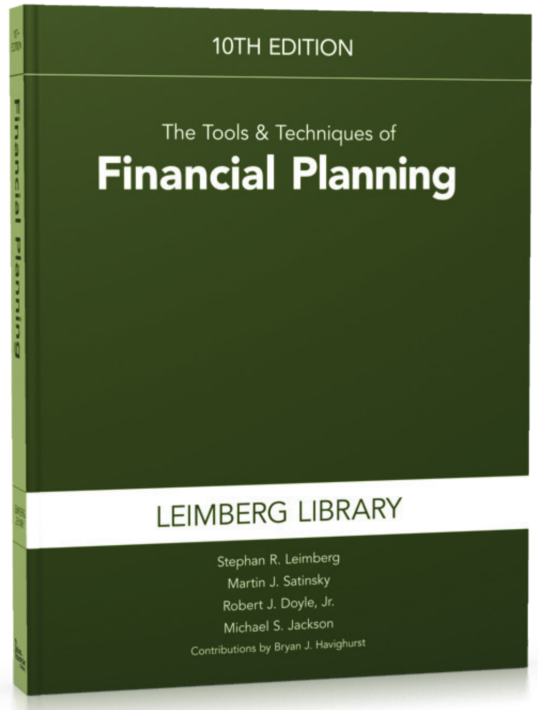

The Tools & Techniques of Financial Planning, 10th Edition

S. Leimberg | M. Satinsky | R. Doyle, Jr. | M. Jackson

The Tools & Techniques of Financial Planning, 10th Edition, includes coverage of the full scope of the financial planning process. This new edition is updated to include: coverage of the impact of the market downturn and uncertain economic times on financial planning; discussion of deductible losses from traditional and Roth IRAs, Section 529 plans, and ESAs; updated tax-favored funding provisions, grants, loans, expected family contributions, and other college amounts; overview of popular trusts, such as grantor trusts, charitable trusts, and marital/bypass trusts; and implications of transfers of property between spouses related to divorce and discussion of what is regarded as marital property for divorce purposes.

Highlights of the new 10th Edition include:

- Updated information on professional financial planning education and credentials, including information about state and federal registration and regulations related to assets under management and fiduciary duty
- Substantially updated material on financial services industry regulations and financial institutions resulting from the Dodd-Frank Act
- New information in Chapter 7, related to the CFP Board's disciplinary rules and procedures, as well as professional standards
- Updated information on nontraditional couples
- Updated information about Long-term Care costs and options and Medicare
- Significant new and updated material related to the impact of the Great Recession on financial and estate planning
- Implications of the investment planning process and related fundamental concepts, as well as a thorough discussion on an investment planning concept of key importance: the issue of active versus passive (indexed) investment management

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Product # 2770010 • Pub Date: July 2012
ISBN: 978-1-936362-84-4 • Format: Paperback, 8½″x11″
Page Count: 550 pages • Retail Price: $155.00
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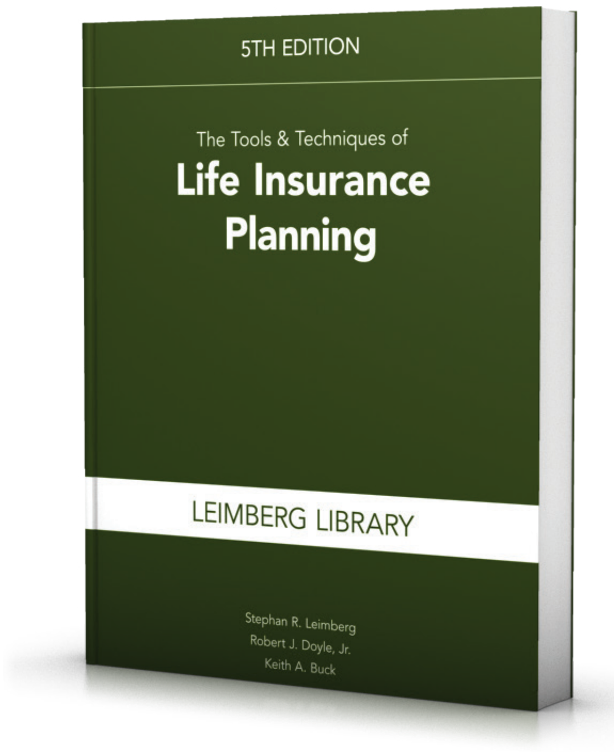
The Tools & Techniques of Life Insurance Planning, 5th Edition

S. Leimberg | R. Doyle, Jr. | K. Buck



This fully revised edition serves as a comprehensive foundation for Life Insurance Planning:

On the Tools side:

- Insights into Guaranteed No-Lapse Life Insurances
- Indexed Life Insurance
- Broader discussions of new riders, including:
  Accelerated benefits riders • Catastrophic illness riders • Long-term care riders v. long-term care policies • Extension of benefits riders

On the Techniques side:

- New chapter on life insurance valuation—for income, gift and estate-tax purposes
- Expanded coverage of Irrevocable Life Insurance Trusts—especially the use of flexible ILITs in an uncertain estate-tax environment
- Substantive updates to the chapter on split-dollar life insurance products
- Significantly revised and expanded chapter on Viatical and Life Settlements

Plus, this new edition includes the following new chapters:

Disability (Living Death) Insurance • Indexed Universal Life • Guaranteed No-Lapse Universal Life • Life Insurance Valuation

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Product # 2700005
Pub Date: Jan 2013
ISBN: 978-1-938130-89-2
Format: Paperback, 8½″x11″
Page Count: 656 pages
Retail Price: $155.00
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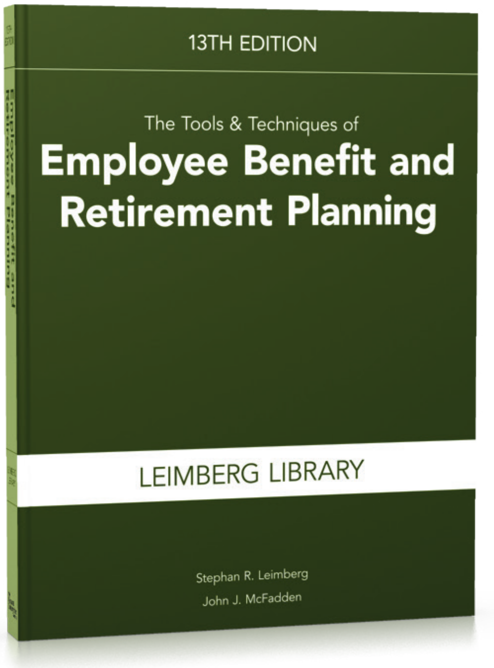
Risk Management for Financial Planners, 2nd Edition

C. Barlow | D. Chandler | K. Maheu | S. Maloney | S. Massmann | D. Reitz | D. Thamann

When partnered together, ***The Tools & Techniques of Life Insurance Planning*** and ***Tools & Techniques of Risk Management for Financial Planners*** provide comprehensive coverage of and major topics in risk management and life insurance.
Product # 8070002 • Pub Date: 2007 • ISBN: 978-0-87218-934-8 • Format: Paperback, 8½″x11″ • Page Count: 258 pages • Retail Price: $75.00

The Tools & Techniques of Life Insurance Planning, 5th Edition, and Risk Management for Financial Planners Combo Bundle:
Bundle Product # 8080003 • ISBN: 978-1-938130-93-9 • Student Price: $172.50 (SAVE 25%)



The Tools & Techniques of Employee Benefit and Retirement Planning, 13th Edition

S. Leimberg | J. McFadden

Written by experts Stephan Leimberg and John McFadden, ***The Tools & Techniques of Employee Benefit and Retirement Planning, 13th Edition***, applies the trusted "Tools and Techniques" approach, enabling students to grasp even the most complex employee benefit and retirement planning processes.

This new, completely updated 13th edition covers:

- Practical guidance on the phase-in of the Affordable Care Act
- Tax changes in the American Taxpayer Relief Act
- Updated benefit limits through 2013

And it also delivers:

- A new chapter covering Veterans benefits
- Current insights into trends affecting retirement plans, including government benefits, IRAs, ERISA and Tax Rules for Qualified Plans, Defined Benefit Plans, Defined Contribution Plans, and other Employer Sponsored Retirement Plans
- Practical analysis of the entire range of employee benefit planning, including: Cash Compensation, Equity Options, Cafeteria Plans, Life Insurance Plans, Health Coverage, Disability, and Fringe Benefits
- Student-friendly organization and discussions: including in-depth explanations, logical layout of material, charts/ tables/ sample forms, review questions, and useful appendices

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Product # 2710013
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Page Count: 530 pages
Retail Price: $155.00
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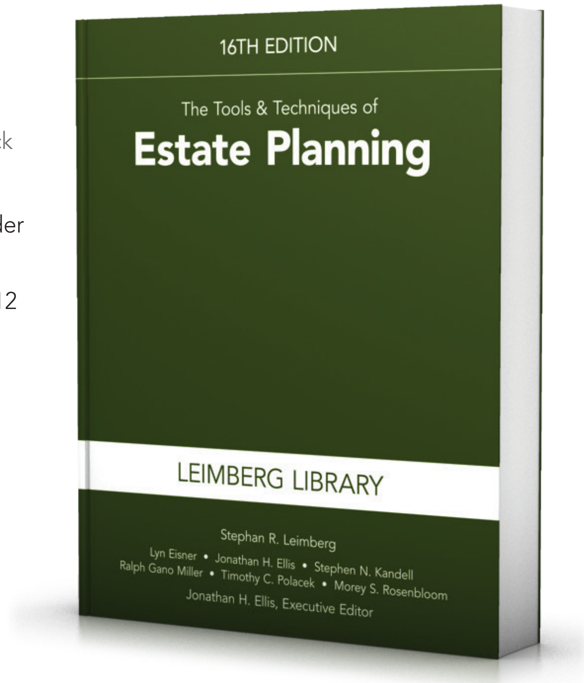
The Tools & Techniques of Estate Planning, 16th Edition

S. Leimberg | J. Ellis | S. Kandell | R. Gano Miller | T. Polacek | M. Rosenbloom | L. Eisner | G. Zwick



This new 16th edition teaches students the tools and techniques that every estate planner, financial planner, and insurance professional needs to help their clients preserve their assets under current law.

The 16th Edition is completely updated to conform with the American Taxpayer Relief Act of 2012 and delivers enhancements covering:

Wills • Selection of Executors, Trustees, and Attorneys • Estate, Gift, and Generation-Skipping Taxes • Income Taxation • Marital Deduction and Bypass Trusts • Family Limited Partnerships

Other highlights of the 16th Edition include:

- New, time-saving forms for estate planning
- New guidance on handling intra-family loans
- New chapter on Digital Estate Planning issues

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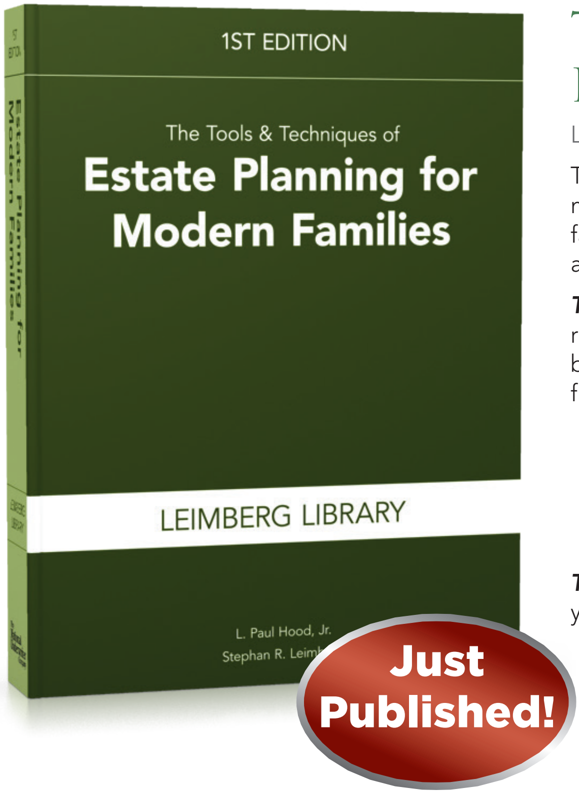

The Tools & Techniques of Estate Planning for Modern Families

L. P. Hood | S. Leimberg

This new textbook discusses the estate planning issues that are unique to blended families. It moves from a basic estate planning overview to a discussion of the unique factors of blended families. It also includes tax issues, premarital and relationship formalization considerations, and lifetime estate planning options.

The Tools & Techniques of Estate Planning for Modern Families is simply the only resource that focuses exclusively on handling the issues associated with estate planning for blended, step, and same-sex families. This groundbreaking resource covers these blended-family scenarios:

- Brady Bunch
- May/December
- Empty Nesters
- Eat, Drink, and Remarry

The Tools & Techniques of Estate Planning for Modern Families will immediately enable your students to:

- Fully plan for unmarried partners
- Take into consideration all estate-planning issues connected with blended families
- Manage the effects of the Supreme Court's ruling regarding the Defense of Marriage Act
- Help clients preserve their assets through changing circumstances
- Quickly fill in the huge gaps in traditional estate-planning references
- Steer far clear of major malpractice pitfalls

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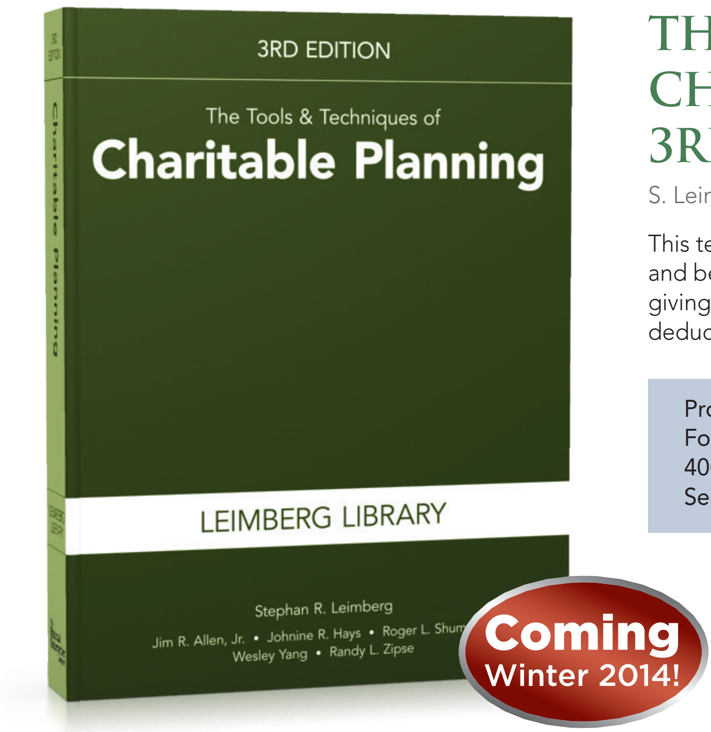

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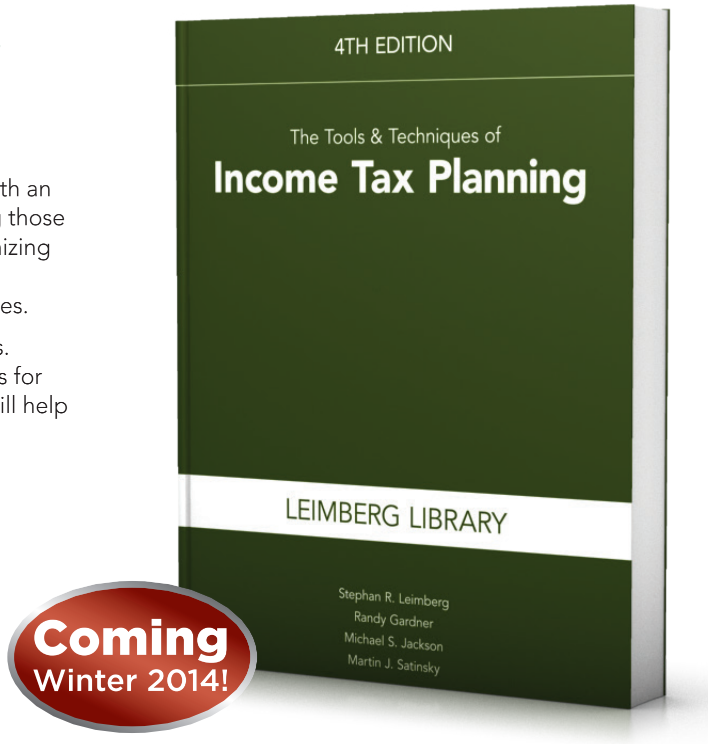

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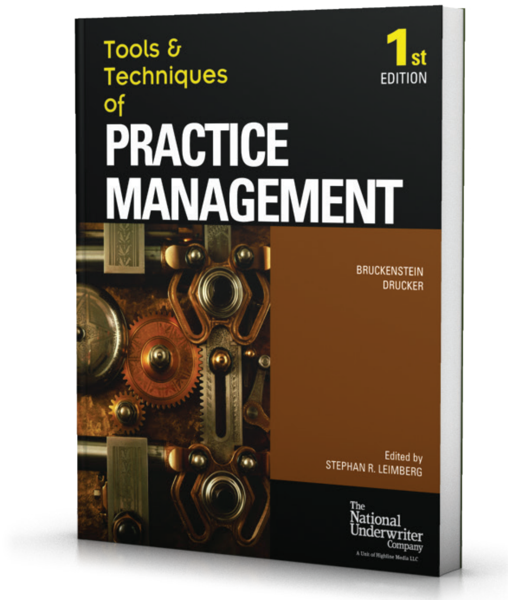

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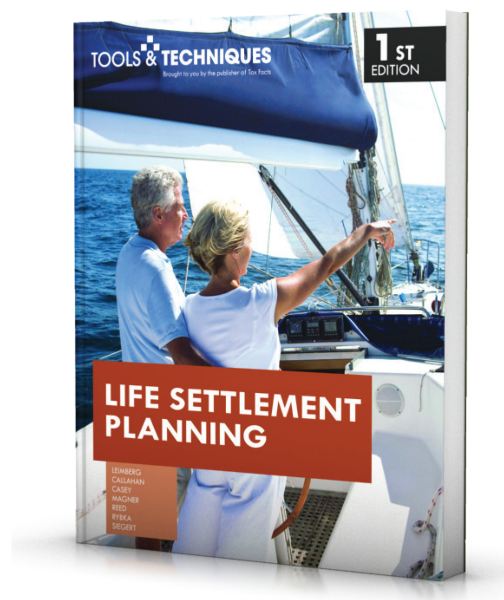

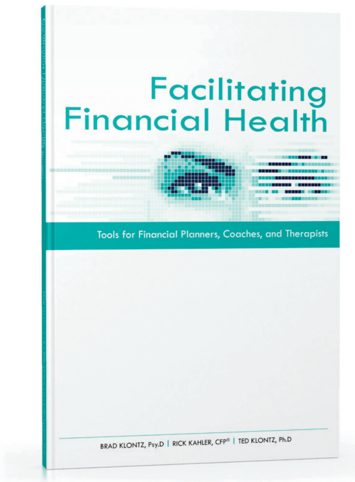

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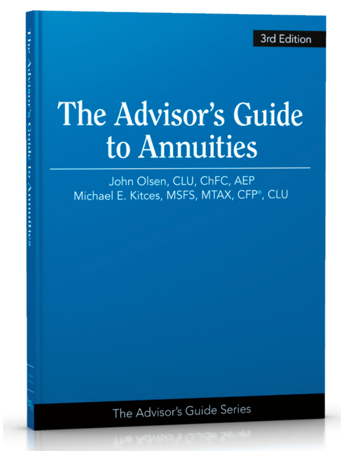

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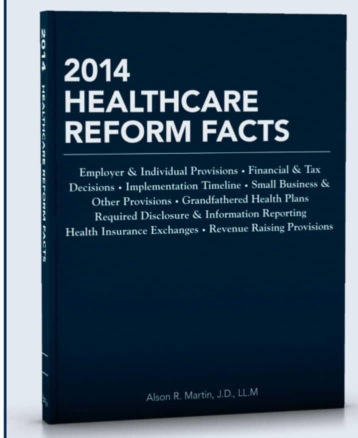

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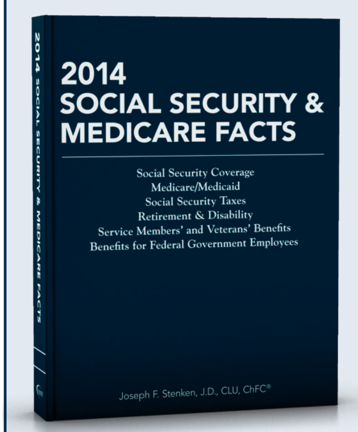

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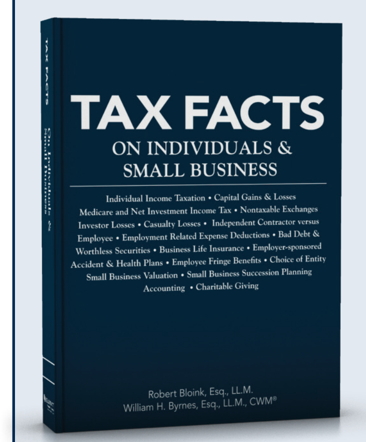

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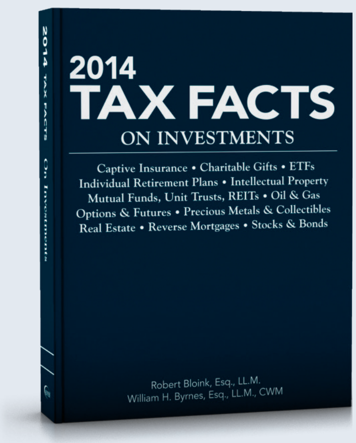

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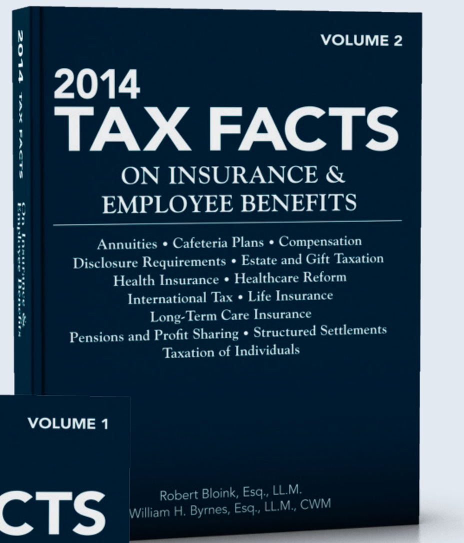

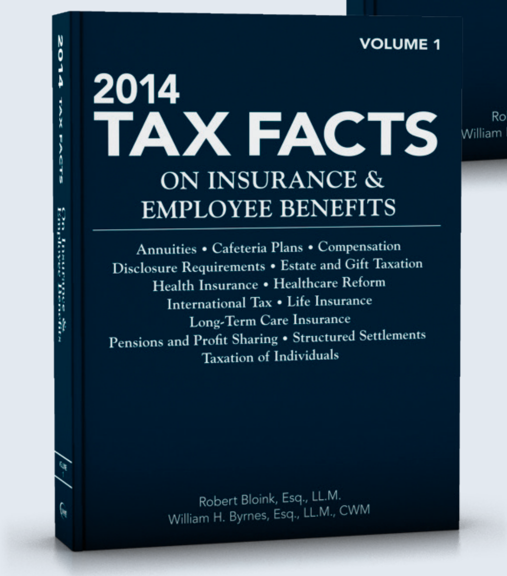

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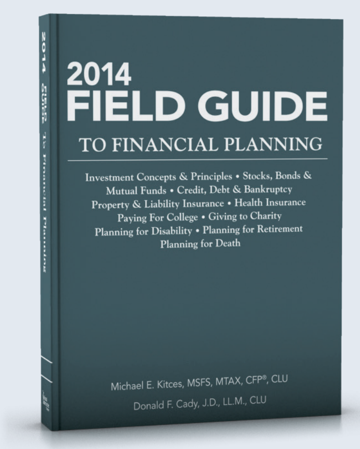

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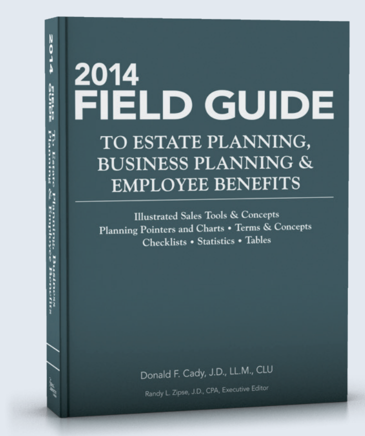

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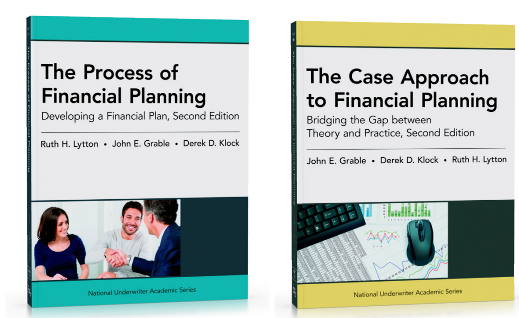

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