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2015 Fall Academic

Catalog

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Dear Instructor:

We at The National Underwriter Company are excited to present to you the new 2015 Academic Catalog. Our latest collection of resources reflects our continuing dedication to preparing for future success by providing the most effective and up-to-date tools possible. Our offerings truly represent today's modern financial planning curriculum, as they address the full range of educational needs in the areas of Employee Benefits, Estate Planning, Financial Planning, Income Tax, Insurance & Risk Management, and Investment Planning.

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Sincerely,

Kelly Maheu, J.D.
Managing Director, Professional Publishing
National Underwriter

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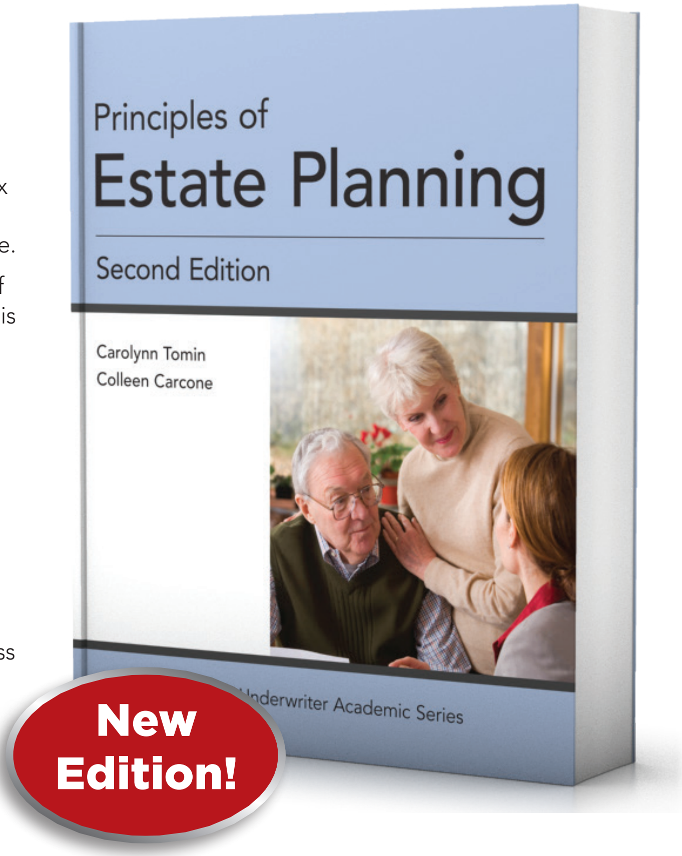
Principles of Estate Planning, 2nd Edition

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.

The authors, Carolynn Tomin, CFP®, and Colleen Carcone, J.D., 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!

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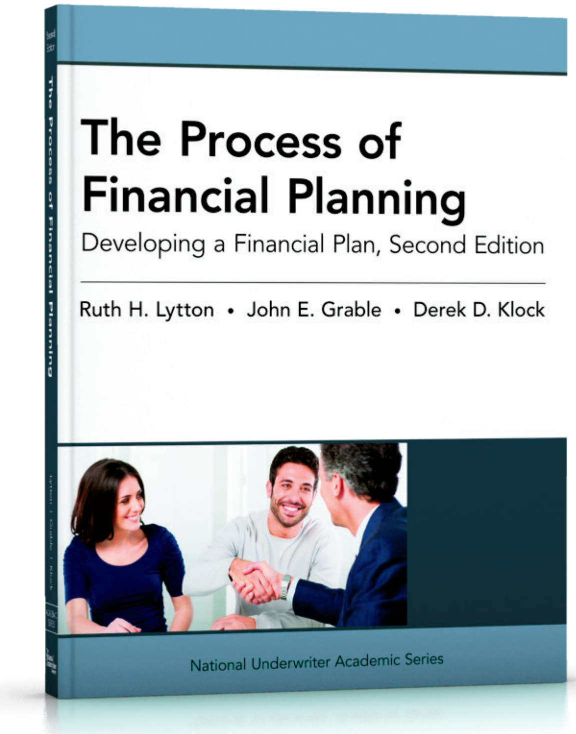
Product: #9110002
Pub Date: May 2015
ISBN: 978-1-941627-57-0
Format: Paperback, 8½"x11"
Page Count: 672
Retail Price: $135
Also available as an eBook
See page 17 for student discount pricing



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, 2nd 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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Product: #7190002
Pub Date: August 2012
ISBN: 978-1-936362-98-1
Format: Paperback, 8½"x11"
Page Count: 494
Retail Price: $95
Also available as an eBook
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THE COMPREHENSIVE FINANCIAL PLANNING BUNDLE: BUY BOTH AND SAVE 25%!

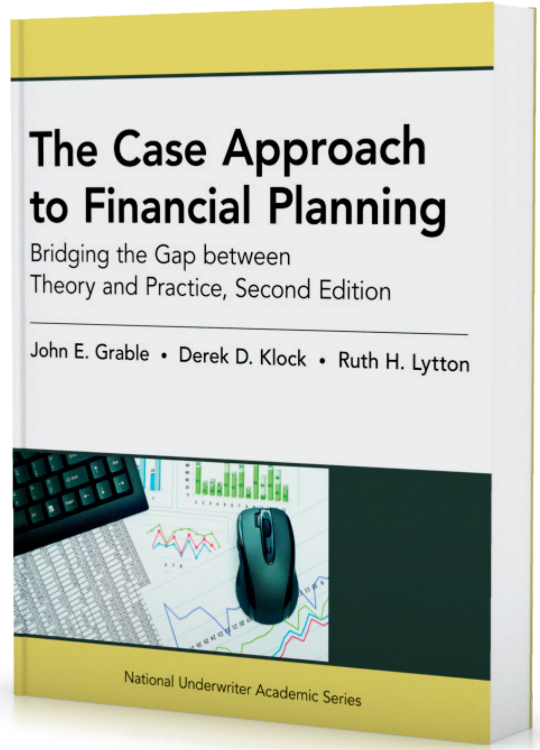
The Process of Financial Planning, 2nd Edition and *The Case Approach to Financial Planning, 2nd Edition*

The Comprehensive Financial Planning Bundle is a special offer for students. Purchase both *The Process of Financial Planning: Developing a Financial Plan, 2nd Edition*, and *The Case Approach to Financial Planning: Bridging the Gap between Theory and Practice, 2nd Edition*, and save 25%.

Bundle Product: #2320002K • ISBN: 978-1-936362-66-0 • Student Price: $168.75 (SAVE 25%)

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

J. Grable | D. Klock | R. Lytton



The Case Approach to Financial Planning: Bridging the Gap between Theory and Practice, 2nd Edition, fosters sound planning logic and decision-making using the systematic financial planning process approach. This textbook provides the tools and foundation for preparing a financial plan and provides students with a real-world demonstration of how a financial plan is developed.

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 2nd 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
ISBN: 978-1-936362-99-8
Format: Paperback, 8½"x11"
Page Count: 861
Retail Price: $130
Also available as an eBook
See page 17 for student discount pricing

The Tools & Techniques of Financial Planning, 11th Edition

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

The Tools & Techniques of Financial Planning, 11th Edition, provides complete coverage of the principles, processes, and practice of financial planning. This book is a must-have resource for any planner who desires a well-organized approach for explaining financial planning strategies to clients and is concerned with the suitability of the products offered.

The Tools & Techniques of Financial Planning has been fully updated to reflect state-of-the-art thinking in this critical subject area including:

- New chapter on serving cross-cultural clients introduces important concepts as cultural sensitivity, immigration and tax issues, and important financial planning techniques for clients form immigrant communities or U.S. nationals with financial interests abroad
- 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
- Information on disability planning techniques help planners with clients who are approaching or at retirement age and trying to protect themselves against the financial consequences of potential or existing health concerns
- New section on building the client-planner relationship helps build stronger bonds with clients and grow their practices through trust-based client referrals
- Updated content on nontraditional couples
- New chapter on comprehensive retirement income planning

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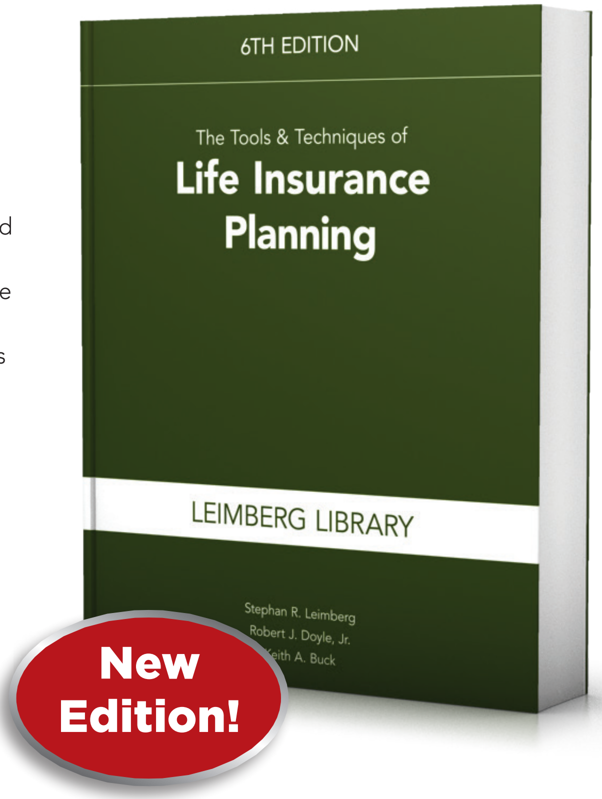
Product: #2770011
Pub Date: April 2015
ISBN: 978-1-941627-51-8
Format: Paperback, 8½"x11"
Page Count: 608
Retail Price: $165.00
Also available as an eBook
See page 17 for student discount pricing

The Tools & Techniques of Life Insurance Planning, 6th Edition

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



The Tools & Techniques of Life Insurance Planning, 6th Edition, delivers:

- Detailed information about the entire range of life insurance products that can be used by estate and financial planners in a wide variety of circumstances
- Planning techniques for retirement income needs, estate and gift tax avoidance, estate liquidity needs, and long-term care planning
- Plain-language descriptions of the tax consequences of various life insurance products and strategies that plans can use to minimize tax liabilities
- Coverage of advanced topics, such as 103 exchanges, the transfer-for-value rule, and the use of life insurance products for charitable gift planning

This latest edition includes new and expanded coverage of:

- Strategies for life insurance planning that take into account higher tax rates and the new Net Investment Income Tax
- Expert advice on how to modify existing life insurance plans in light of recent changes to portability rules and the increased estate tax exemptions
- Updates on DOMA/same-sex marriage issues and their effect on life insurance planning for new and existing clients
- Insight in to how state-level changes to dynasty trusts and the Rule against Perpetuities (RAP) affect life insurance planning
- Enhanced buy-sell agreement strategies
- Information about entity redemption as a technique for providing estate tax liquidity

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Product: #2700006
Pub Date: March 2015
ISBN: 978-1-941627-55-6
Format: Paperback, 8½″x11″
Page Count: 688
Retail Price: $165.00
Also available as an eBook
See page 17 for student discount pricing

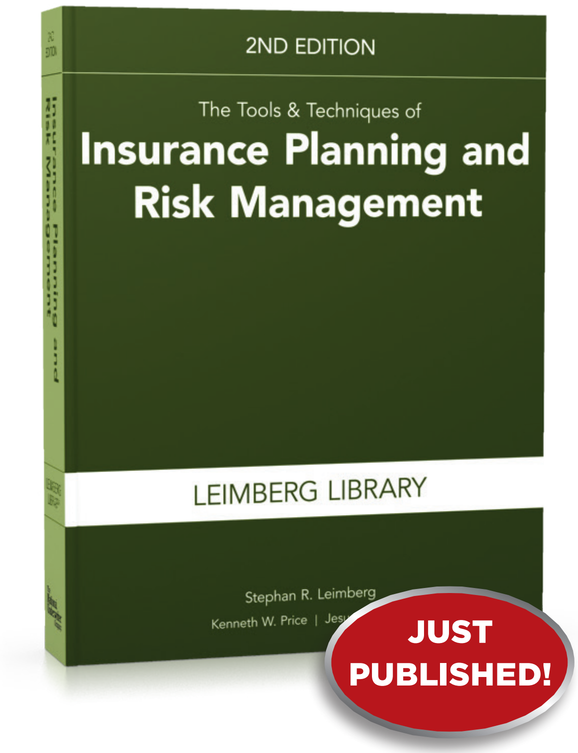
Risk Management for Financial Planners, 2nd Edition

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

Product: #8070002 • Pub Date: 2007 • ISBN: 978-0-87218-934-8 • Format: Paperback, 8½″x11″ • Page Count: 258 • Retail Price: $75.00

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.

The Tools & Techniques of Life Insurance Planning, 6th Edition **and *Risk Management for Financial Planners* Combo Bundle:**
Bundle Product: #8080004 • ISBN: 978-1-941627-61-7 • Student Price: $180.00 (SAVE 25%)



THE TOOLS & TECHNIQUES OF INSURANCE PLANNING AND RISK MANAGEMENT, 2ND EDITION

S. Leimberg | K. Price | J. Pedre

The Tools & Techniques of Insurance Planning and Risk Management is designed to help financial planners and other client-focused advisors understand the complex interplay of risk management and insurance planning techniques. It combines an exploration of risk analysis and risk mitigation techniques with a comprehensive overview of insurance planning strategies that are focused on individual and small business clients.

The newly updated and expanded material covers:

- Extensive treatment of individual insurance planning topics, including property and casualty insurance, disability insurance, long-term care insurance, annuities, and life insurance
- Comprehensive strategies for conducting insurance needs analysis for individual and small business clients
- The latest changes related to health care reform and health cost management approaches, including real world applications for both business and individual health insurance purchasers
- In-depth information about commercial insurance products, including general liability, business auto and property, employment practices liability, and director and officer liability
- Techniques for selecting insurance companies and policies, as well as claims management
- The tax implications of various types of insurance products, including life insurance

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Product: #2960002
Pub Date: October 2014
ISBN: 978-1-939829-92-4
Format: Paperback, 8½"x11"
Page Count: 448
Retail Price: $165.00
Also available as an eBook
See page 17 for student discount pricing

THE TOOLS & TECHNIQUES OF INVESTMENT PLANNING, 3RD EDITION

S. Leimberg | R. Doyle, Jr. | T. Robinson | R. Johnson

This new 3rd edition of ***The Tools & Techniques of Investment Planning*** provides students with a straightforward approach to a complicated topic. This book tackles the challenging topic of investment planning in a way that allows students to turn information into real-world strategies. The tools and devices used in investment planning are broken down and combined with a description of how to apply these concepts using solid investment strategies. Formulas, tables, exhibits, and numbers are presented that will help equip students to construct sound investment plans.

New chapters in this edition include: An Introduction to the Investment Planning Process, Hedge Funds, Separately Managed Accounts and Unified Managed Accounts, and Structured Products.

Combined with the existing fully updated chapters, these new chapters provide a foundation for discovering, understanding, and applying solid investment planning strategies for today's investor.

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Product: #2730003
Pub Date: November 2013
ISBN: 978-1-939829-16-0
Format: Paperback, 8½"x11"
Page Count: 640
Retail Price: $165.00
Also available as an eBook
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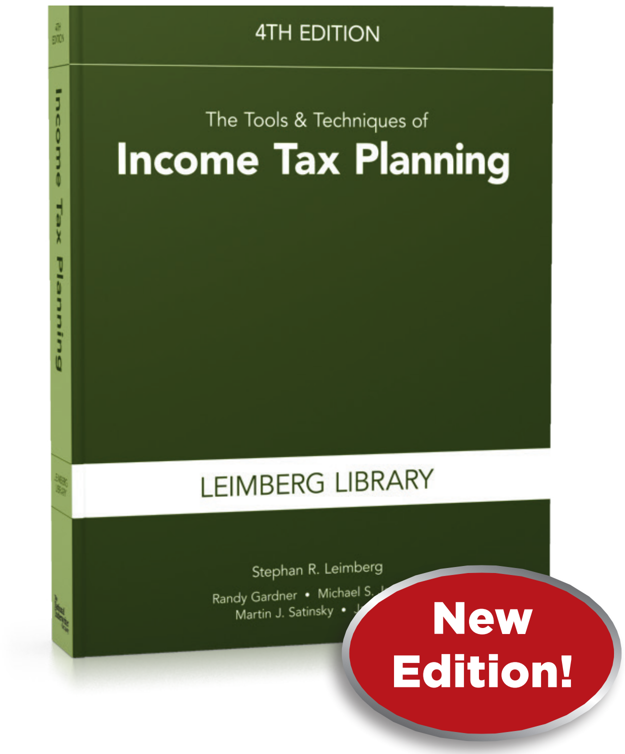

THE TOOLS & TECHNIQUES OF INCOME TAX PLANNING, 4TH EDITION

S. Leimberg | R. Gardner | M. Jackson | M. Satinsky | J. Katz

Now in its 4th edition, the popular and practical ***The Tools & Techniques of Income Tax Planning*** continues to hold its place as the clear, concise and fundamental resource for your students. The textbook provides everything your students need to put the optimal strategic plan in place, while taking into consideration the tax-related elements of:

- The American Recovery and Reinvestment Act
- The Affordable Care Act
- The American Taxpayer Relief Act

The Tools & Techniques of Income Tax Planning, 4th Edition, contains six entirely new chapters, which were added to fully reflect recent legislative changes as well as other, crucial developments in this area:

- Business and Non-business Losses
- Self-Employment and Social Security Taxes
- Additional Medicare Tax on Earned Income and Net Investment Income
- Withholding and Estimated Tax Requirements
- Income Tax Issues in Wealth Transfer Planning
- Discharge of Debt

Income tax planning is just one part of successful financial and estate planning goals. With this book, students will learn how to create and establish appropriate strategies in ways that will help their clients meet their overall financial goals.

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Product: #2740004
Pub Date: September 2014
ISBN: 978-1-939829-55-9
Format: Paperback, 8½"x11"
Page Count: 416
Retail Price: $165.00
Also available as an eBook
See page 17 for student discount pricing

The Tools & Techniques of Employee Benefit and Retirement Planning, 14th Edition

S. Leimberg | J. McFadden | C. Frederick Reish

The Tools & Techniques of Employee Benefit and Retirement Planning, 14th 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 14th edition delivers:

- The latest information about qualified and nonqualified deferred compensation planning, including tax, legal and ERISA requirements
- Extensive section on health benefits provides critical information about healthcare reform requirements under the ACA, including a detailed timeline of mandates for all sizes of employers
- New chapter on ERISA litigation lets planners and practitioners know what the hot topics are so that their plans can remain complaint with the latest regulations
- Increased coverage of the use of life insurance for plan funding techniques
- Helpful tips about how HSAs and FSAs can be integrated with group health benefits in the post-ACA environment to provide maximum benefits to retain key employees
- And Much More!

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Product: #2710014
Pub Date: June 2015
ISBN: 978-1-941627-49-5
Format: Paperback, 8½"x11"
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Retail Price: $165.00
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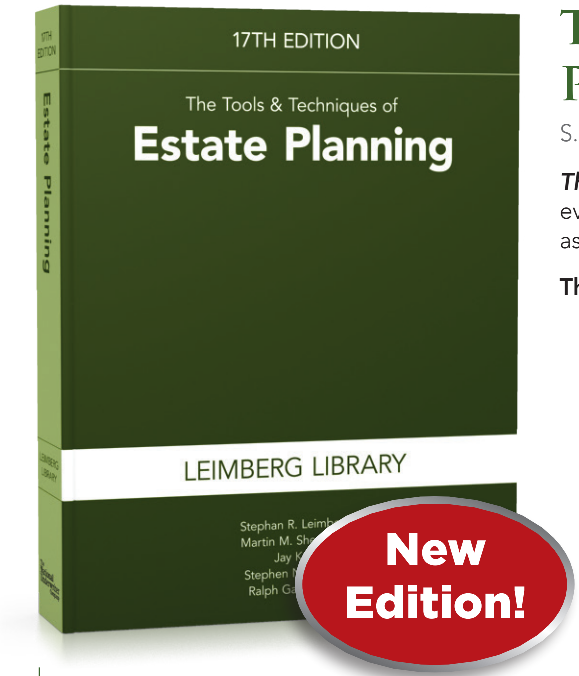

THE TOOLS & TECHNIQUES OF ESTATE PLANNING, 17TH EDITION

S. Leimberg | M. Shenkman | J. Katz | S. Kandell | R. Gano Miller

The Tools & Techniques of Estate Planning teaches students the tools and techniques that every estate planner, financial planner, and insurance professional needs to help their clients assets under current law.

This new edition 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
- Estate Planning for Clients and Beneficiaries with Special Needs
- Use of Corporate Entities
- Post-DOMA Planning Techniques
- And much more!

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Product: #2850017
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ISBN: 978-1-941627-45-7
Format: Paperback, 8½"x11"
Page Count: 872
Retail Price: $165.00
Also available as an eBook
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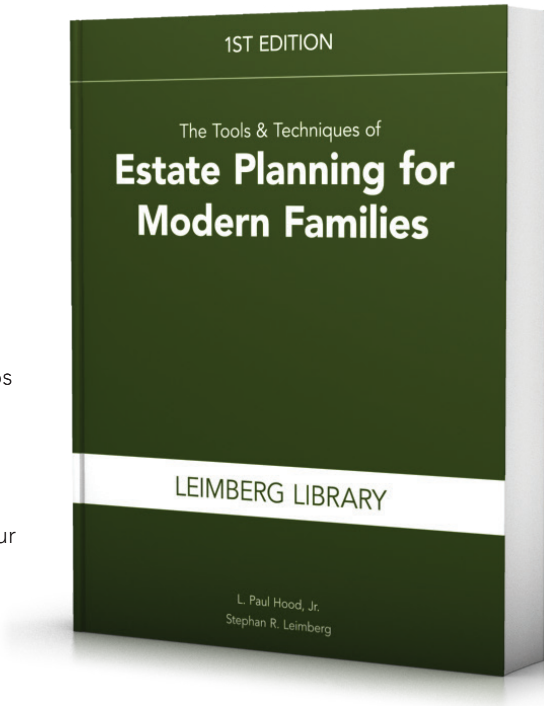
THE TOOLS & TECHNIQUES OF ESTATE PLANNING FOR MODERN FAMILIES

L. P. Hood, Jr. | 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 the blended-family scenarios that estate planners are encountering more and more frequently:

- May/December
- Empty Nesters
- Non-Traditional Blended Family
- And more!

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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Product: #2890000
Pub Date: November 2013
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Format: Paperback, 8½"x11"
Page Count: 848
Retail Price: $165.00
Also available as an eBook
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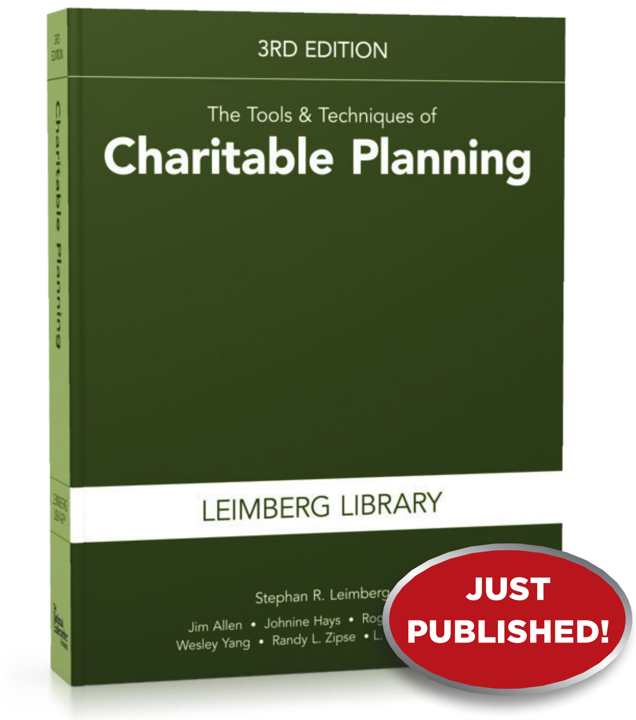

THE TOOLS & TECHNIQUES OF CHARITABLE PLANNING, 3RD EDITION

S. Leimberg | J. Allen | J. Hays | R. Shumaker | W. Yang | R. Zipse | L. P. Hood, Jr.

The Tools & Techniques of Charitable Planning, 3rd Edition, has been fully revised, expanded and enhanced and provides instant access to all of the vital information necessary for guiding your students through important charitable planning decisions.

This new edition delivers:

- New tools to help deal with higher capital gain tax rates
- New chapter on Charitable Life Estates
- Techniques specifically geared toward organizing and strengthening the approaches used by planned giving teams within charitable organizations
- Tools for meeting the expectations of continuing growth in the value of assets often used to fund charitable gifts
- Exploration of recent trends toward using CRUTS rather than CRATS
- Insights into the best techniques to meet planned giving goals in a low-interest-rate environment, including the use of CLATs
- New content on Type III supporting organizations
- Expert tips on using charitable gift annuities in death

Comprehensive updates throughout the book will help your students understand the new tax rules, including the effects of the Net Investment Income Tax on donors, beneficiaries, and trusts.

The Tools & Techniques of Charitable Planning, 3rd Edition, includes completely current insights into:

- The features and benefits of the most common charitable giving plans
- The current legislation that governs charitable giving
- Income rules and limits
- Critical valuation uses and potential ethical pitfalls
- Private versus community foundations
- Charitable annuities, trusts, funds and life insurance
- Popular software and technology associated with charitable giving

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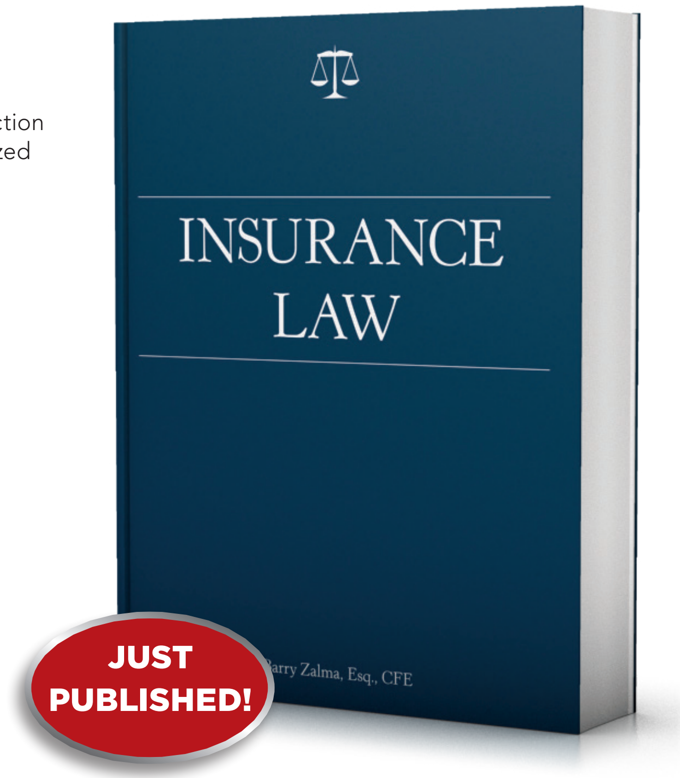
Product: #2500003
Pub Date: September 2014
ISBN: 978-1-939829-94-8
Format: Paperback, 8½"x11"
Page Count: 432
Retail Price: $165.00
Also available as an eBook
See page 17 for student discount pricing

INSURANCE LAW

B. Zalma



Insurance Law, written by Barry Zalma, provides the perfect cross-vocational introduction to insurance law—giving students a solid, fundamental understanding of this specialized area of law.

Both comprehensive and practical, ***Insurance Law*** covers such key concepts as:

- The contract of personal indemnity
- Construction of insurance contracts
- Differences between property and liability policies
- Rescission and preemption
- Duties of the Insured and Insurer
- The Doctrine of Fortuity
- Trigger of Coverage
- Fraud and false swearing
- Subrogation
- Punitive damages
- and much more!

This practical resource delivers:

- Built-in discussion questions and teaching points
- Extended margins for in-text note taking
- Up-to-date, multi-jurisdictional case law
- Included model statutes and state by state fraud statutes

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Product: #6690000
Pub Date: April 2015
ISBN: 978-1-941627-32-7
Format: Paperback, 8½"x11"
Page Count: 960
Retail Price: $189.00
Also available as an eBook
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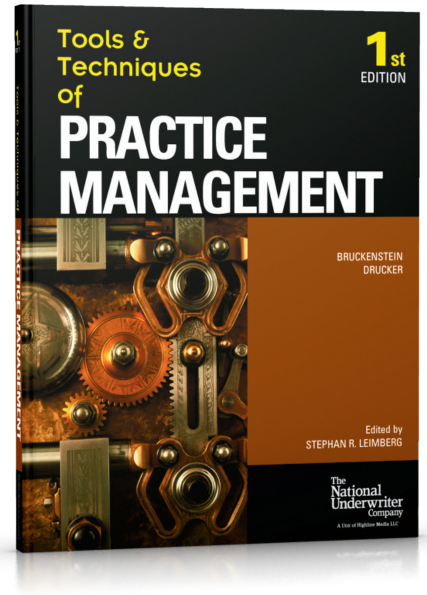
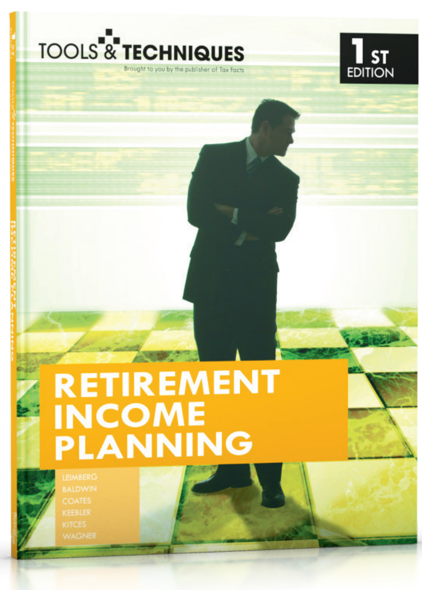


TOOLS & TECHNIQUES OF PRACTICE MANAGEMENT

J. Bruckenstein | D. Drucker | S. Leimberg

Students will discover detailed steps necessary to effectively run a practice and achieve profitable, client-focused results. This book addresses an often-overlooked topic: Business of Financial Planning. In today's increasingly competitive marketplace, fine-tuning practice management skills is a necessity—while allowing more time to cultivate new business and focus on clients. The authors deliver practical insight into selecting a business model as well as the advantages and disadvantages of relevant topics including owning a practice.

Product: #2690000
Pub Date: 2004
ISBN: 0-87218-653-9
Format: Paperback, 8½″x11″
Page Count: 302
Retail Price: $165.00



TOOLS & TECHNIQUES OF RETIREMENT INCOME PLANNING

S. Leimberg | B. Baldwin | A. Coates | R. Keebler | M. Kitces | W. Wagner

Tools & Techniques of Retirement Income Planning addresses the emerging need to satisfy clients' perceived and actual security—based on psychological and behavioral finance issues. Students will understand defining/reducing risk, stochastic modeling and income planning research, as well as future trends facing Baby Boomer retirement. Students will discover how to develop custom models targeted at replacing the stability of a regular monthly paycheck while controlling withdrawals.

Product: #2680000
Pub Date: 2007
ISBN: 978-0-87218-922-5
Format: Paperback, 8½″x11″
Page Count: 273
Retail Price: $165.00

TOOLS & TECHNIQUES OF LIFE SETTLEMENT PLANNING

S. Leimberg I C. Callahan I B. Casey I J. Magner I B. Reed I L. Rybka I P. Siegert

Life Settlement Planning is a comprehensive, practical guide covering the entire spectrum of the life settlement business. This textbook covers the scope of the life settlement business: from what life settlements are, how and why they work, and the various parties involved. Students will understand the benefits and opportunities for individual, trust, business, academic, or other organizational owners, as well as tips for making settlements work, and case-studies that illustrate the variety of ways that a life settlement can prove to be a valuable transaction.

Product: #2630000
Pub Date: 2008
ISBN: 978-0-87218-968-3
Format: Paperback, 8½″x11″
Page Count: 507
Retail Price: $165.00

NUCollege

The National Underwriter Academic Support Site – www.nucollege.com

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Core Textbooks by Subject Area

Offering a full range of educational resources in the areas of Employee Benefits, Estate Planning, Financial Planning, Income Tax, Insurance & Risk Management, and Investment Planning, NUCollege provides print and online materials that improve preparation, performance, and results—both in the classroom and far beyond.

» Estate Planning
- Principles of Estate Planning, 2nd Edition
- The Tools & Techniques of Estate Planning, 17th Edition
- The Tools & Techniques of Estate Planning for Modern Families

» Financial Plan Development (Capstone)
- The Process of Financial Planning: Developing a Financial Plan, 2nd Edition
- The Case Approach to Financial Planning: Bridging the Gap between Theory and Practice, 2nd Edition

» Financial Planning
- The Tools & Techniques of Financial Planning, 11th Edition

» Income Tax Planning
- The Tools & Techniques of Income Tax Planning, 4th Edition
- The Tools & Techniques of Charitable Planning, 3rd Edition

» Insurance Planning
- The Tools & Techniques of Life Insurance Planning, 6th Edition
- Risk Management for Financial Planners, 2nd Edition
- The Tools & Techniques of Insurance Planning and Risk Management, 2nd Edition

» Investment Planning
- The Tools & Techniques of Investment Planning, 3rd Edition

» Retirement Planning
- The Tools & Techniques of Employee Benefit and Retirement Planning, 14th Edition

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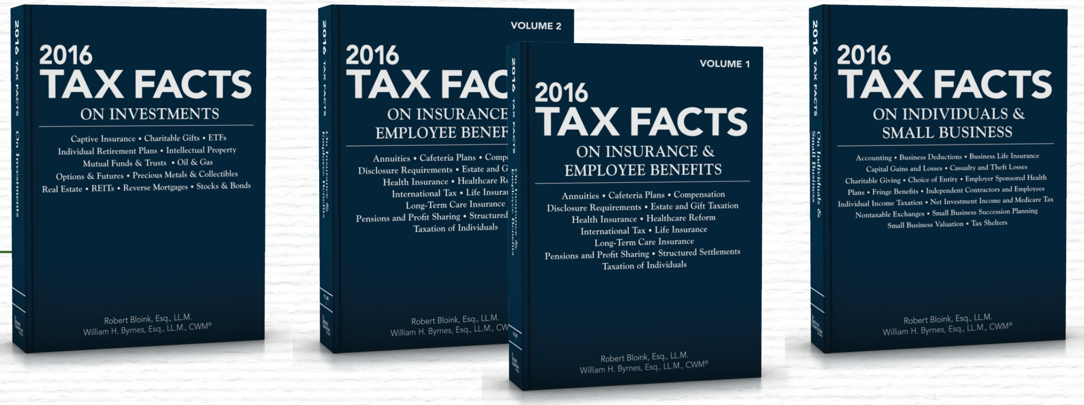

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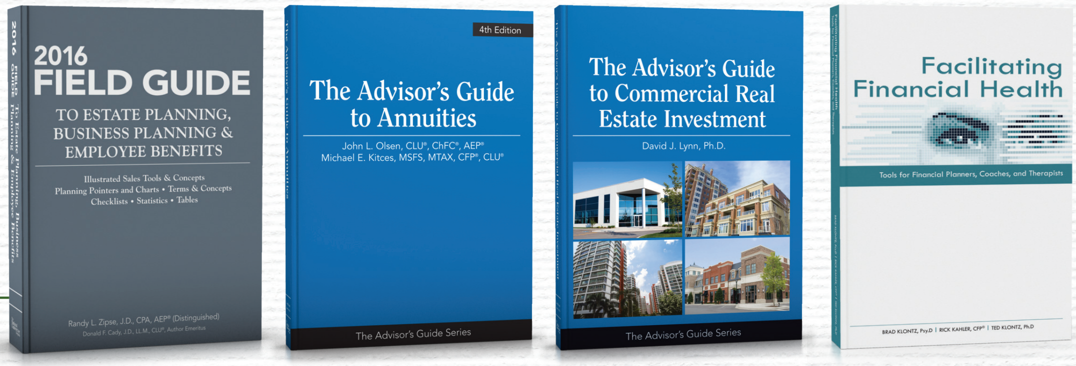

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