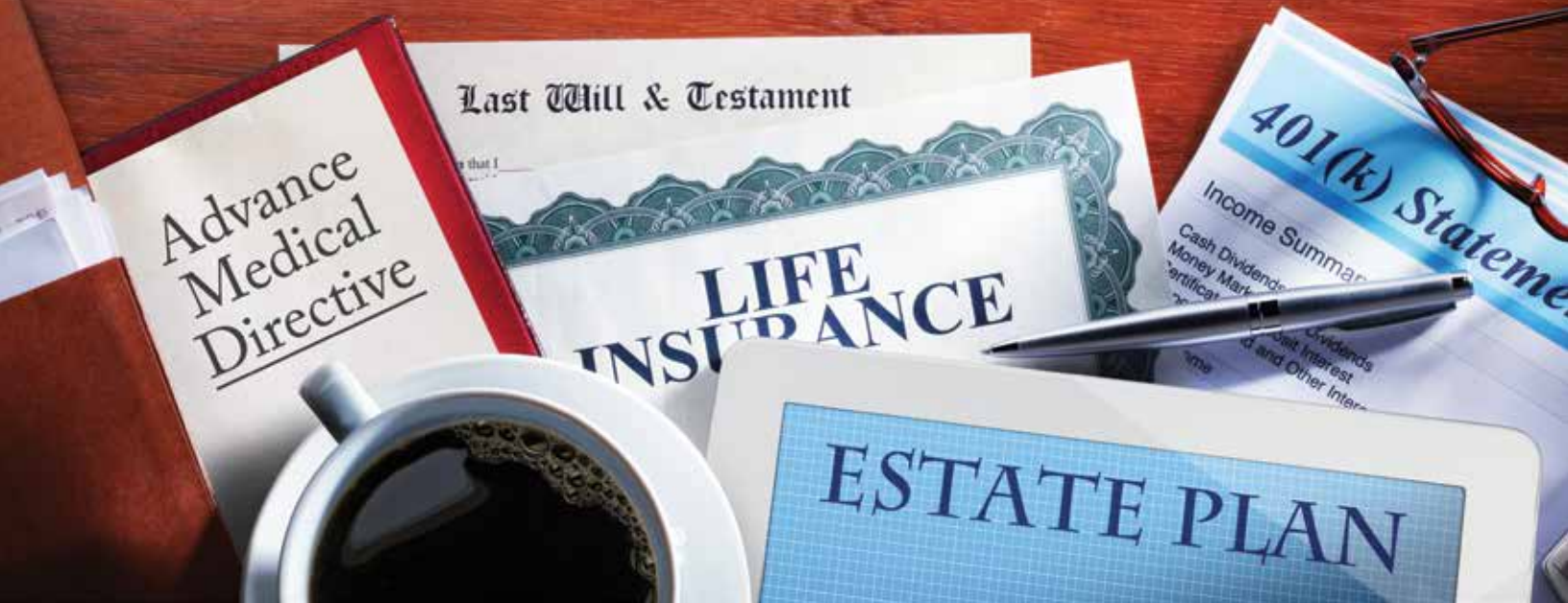


Estate Planning and Administration, Probate, Trusts and Gifts, and Elder Law

2021 Catalog of Legal Resources

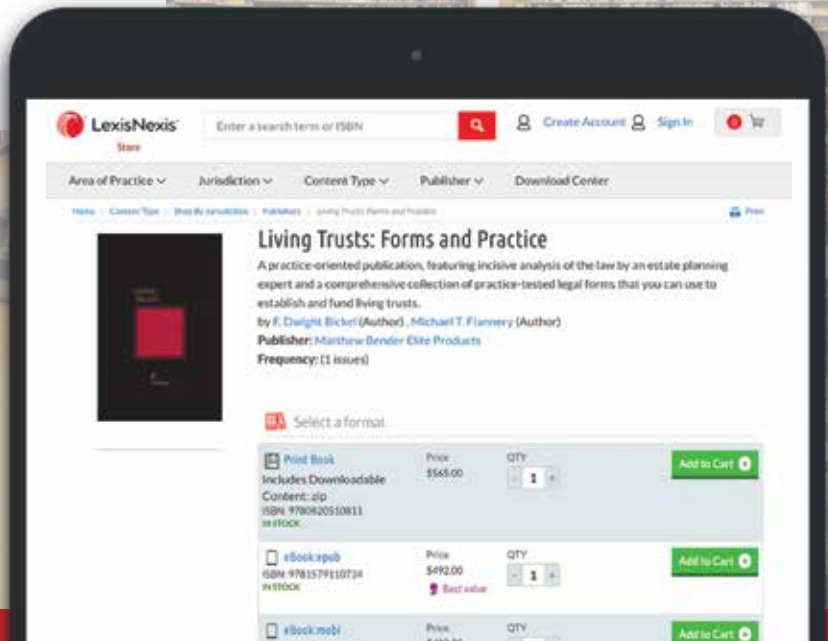


The demand for legal guidance on estate planning and administration, probate, trusts and gifts, and elder law issues has intensified. Respond to the demands of your practice with authoritative content from LexisNexis®.

FOR MORE INFORMATION OR TO ORDER:



One-stop legal resource shop



Shop the top legal resources from anywhere at the LexisNexis® Store.



You're only as good as your source. Take the lead with **legal practice guides, treatises, deskbooks, court rules and statutes** that inform the work you do every day.



Be a name dropper. Tap on authoritative resources from **Matthew Bender®**, **Michie™** and **Mealey's®**, plus prestigious authors such as Collier, Appleman, Moore, Nimmer, Weinstein and more.



Shop our alliance content—books and eBooks from **AHLA, CSC®, MLRC®, NVLSP, NCAJ, The Florida Bar and more** to bring you unmatched offerings.



Navigate by keyword, state or practice area. Quickly search an unparalleled collection of **more than 3,500 law books and eBooks.**

ESTATE PLANNING AND ADMINISTRATION

Among the host of lessons learned from a world-wide pandemic is the stark reality that we are mortal. As estate planning attorneys, it falls to practitioners to make sure clients' long-term plans and assets are in place and distributed in accordance with the clients' goals. Discover the best ways to help your clients—from preserving assets affected by the market fluctuation, preparing for pending tax legislation, and drafting wills and trusts, to planning for future health care needs and the ideal options for establishing guardianship.

NATIONAL RESOURCES

54th Annual Heckerling Institute on Estate Planning with Index (2020)

2021 marks the 55th annual Heckerling Institute on Estate Planning, the nation's premier conference for estate planning professionals, where prominent authorities discuss and analyze the complexities and intricacies of estate, gift and trust law. Comprised of articles based on lectures delivered at the conference, this single-volume resource will help keep practitioners apprised of changes and trends in areas that impact their clients, such as income and wealth transfer taxes, property laws and the economy.



NS 1 volume, loose-leaf, new articles annually, Pub. #00755, ISBN 9781522197010, eISBN 9781522197027
Prior edition cost: \$749
Prior articles available for purchase on the LexisNexis® Store.

Tax, Estate & Financial Planning for the Elderly

David M. English, John J. Regan, Rebecca C. Morgan

Professional guidance from the leading authors in the field provide legal analysis to help practitioners understand significant issues and resolve the intricate problems that arise. Each chapter begins with common client questions, followed by comprehensive legal analysis, including detailed planning notes, examples and practice tips. Throughout this volume is rich analysis of relevant case law and legislation, as well as explanations of the numerous and often complex administrative steps required to achieve a client's goals. And, although this guide is national in scope, it includes state-specific discussions of significant deviations from the federal rules.



S 1 volume, loose-leaf, updated twice per year, Pub. #00289, ISBN 9780820512891, eISBN 9781579111045
Estimated renewal cost: \$717

TABLE OF CONTENTS

ESTATE PLANNING AND ADMINISTRATION

National Resources	1
State Resources	4

PROBATE

State Resources	9
-----------------------	---

TRUSTS AND GIFTS

National Resources.....	13
State Resources	14

ELDER LAW

National Resources	16
State Resources.....	17

ESTATE PLANNING AND ADMINISTRATION (continued)

Tax, Estate & Financial Planning for the Elderly: Forms & Practice

Michael Gilfix, David M. English, Rebecca C. Morgan

A companion to *Tax, Estate & Financial Planning for the Elderly*, this title contains the forms any estate planning practitioner may need, from client intake and retainer agreements to review and appeal of benefit denials, as well as court petitions and clauses for use in drafting durable powers of attorney, health care proxies, wills and trusts. Forms include: health (Medicare, Medicaid, advance health care directives, long-term care, nursing homes); financial (income, estate and gift taxes, pensions, financial planning, estate planning, property management); government benefits; personal (housing, elder abuse, guardianship); and practice management (managing and building a legal practice).

NS 2 volumes, loose-leaf with downloadable content, updated twice per year, Pub. #00774, ISBN 9780820517742, eISBN 9781579111427
Estimated renewal cost: \$459

How to Save Time & Taxes Handling Estates

Elaine Gagliardi; John A. Clark, original author

This treatise is a comprehensive guide for navigating the federal estate tax return. Complete with the most recent cases, rulings, regulations, fact patterns and forms, it walks the practitioner through every aspect of the return, including: generation-skipping transfer tax and excess retirement accumulations tax; how to take full advantage of tax elections; how to handle the audit and appeals process, as well as payments, collections and refunds; and filing the Decedent's Form 709 (gift tax return).

In addition, practitioners benefit from a schedule-by-schedule guide to preparing Federal Form 706 (estate tax return), including completely filled-in forms and all the information needed for completion of the return in the most tax-saving manner. This resource also provides examples and practice tips to assist practitioners in making computations and in planning, and the appendix reproduces estate and gift tax sections of the Internal Revenue Code, valuation tables and forms.

S 2 volumes, loose-leaf, updated twice per year, Pub. #00203, ISBN 9780820512037, eISBN 9781579112813
Estimated renewal cost: \$853

How to Save Time & Taxes Preparing Fiduciary Income Tax Returns, Second Edition

Diane L. Mutolo

This convenient, single-volume guide provides comprehensive coverage of the federal income taxation of trusts and estates, and features an item-by-item, line-by-line preparation guide to federal Form 1041. Complete with up-to-date cases, rulings, regulations and forms, it helps practitioners make effective tax planning with the aid of rich analysis and discussion on dozens of topics, including: taxable status of trusts and estates and filing requirements; tax treatment of beneficiaries; grantor trust rules; the alternative minimum tax as it applies to trusts, estates and beneficiaries; and a summary of each state's fiduciary income tax rules. In addition, examples and planning notes throughout the volume highlight useful techniques and warn against pitfalls, so practitioners can help their clients reach their goals.

S 1 volume, loose-leaf, updated twice per year, Pub. #00204, ISBN 9780820512044, eISBN 9781579112424
Estimated renewal cost: \$862



Anderson's Estate Planning Forms & Clauses

Jeffrey A. Schoenblum

This resource is packed with essential forms and clauses for wills, living wills, trusts and advance health care directives, as well as clauses specifying investment, business management and other administrative powers of executors or trustees. Forms and clauses are designed with special attention to tax considerations and consequences.

NS 1 volume, softbound with downloadable content, replaced annually, Pub. #04327, ISBN 9781522197508, eISBN 9781522197515
Prior edition cost: \$427



Make every moment count with eBooks

Read your eBook in your web browser on any mobile device with the Read Now feature. No additional software required. In-browser feature is an option at the LexisNexis® download center. Simply click on the Read Now button. eBooks can still be downloaded and used on various devices. The choice is yours. Learn more about eBooks at [lexisnexis.com/ebooks](https://www.lexisnexis.com/ebooks).

LexisNexis eBooks include links to the Lexis+™ and Lexis® services for further legal research options. A valid subscription to Lexis or Lexis+ is required to access content.

In-browser feature requires Internet Explorer® 11 or higher, Chrome™, Safari®, Microsoft Edge® or Firefox®.

Modern Estate Planning, Second Edition

J. Martin Burke, Michael K. Friel, Elaine Gagliardi

Providing a unified transactional approach to estate and financial planning by integrating key aspects of estate, gift and income taxation, this comprehensive treatise covers: detailed background information on the general principles of estate, trust and gift taxation; valuation techniques and drafting considerations; forms and clauses; and guidance on practice and procedure. It also features robust analysis and valuable practice tips on dozens of topics, including: transfers and interests subject to estate and gift taxation; tax deductions, exclusions and credits; generation-skipping transfer taxation; income taxation planning issues; and grantor trusts. The authors offer insight into future estate planning issues.



S 5 volumes, loose-leaf, updated 3 times per year, Pub. #00406, ISBN 9780820554877, eISBN 9781579112103
Estimated renewal cost: \$3,734

Planning for Large Estates

Specifically written for practitioners working with large estates, this practice-oriented planning guide provides analysis of the latest legal trends, planning notes, illustrative examples, practice forms and tax-saving techniques—all with the goal of reducing tax obligations and saving assets for beneficiaries. It pinpoints proven tax-saving procedures and provides step-by-step guidance through the most effective estate freezing methods.

Despite congressional efforts to curtail estate freezing techniques, this indispensable volume explains how to take advantage of some of the most effective wealth transfer techniques, such as: limited liability companies; multi-tier family limited partnerships; irrevocable life insurance trusts; intrafamily business transfers; corporate recapitalizations; intrafamily and charitable gifts; and sales techniques.

NS 1 volume, loose-leaf with downloadable content, updated annually, Pub. #00128, ISBN 9780820511283, eISBN 9781579110802
Estimated upkeep cost: \$568

International Estate Planning, Second Edition

Henry Christensen III

Designed for estate planning professionals and financial advisors, this treatise analyzes myriad estate-related legal matters that implicate U.S. and foreign laws. Gain insight and resolve issues concerning, among others: U.S. estate, gift and income taxation of nonresident aliens; U.S. income taxation of foreign trusts; U.S. tax treatment of foreign executives temporarily posted in the U.S., as well as U.S. executives temporarily posted abroad; conflict of laws rules; will drafting for multiple jurisdictions, with suggested forms; and the effect of treaties on estate planning.

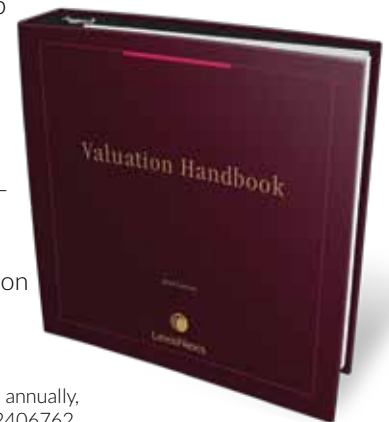
In addition, *International Estate Planning* provides analysis of 15 countries, including Bermuda, Liechtenstein and Switzerland—widely identified as potential sites for establishment of trusts or other investment vehicles, and as possible residences for U.S. nationals for business purposes.

NS 2 volumes, loose-leaf, updated annually, Pub. #00482, ISBN 9780820514826, eISBN 9781579112639
Estimated upkeep cost: \$385

Valuation Handbook

Joni Larson

Accurate valuation is important for any transfer of assets, but in the estate setting, accurate valuation is vital when computing federal and state death tax liabilities. However, arriving at valuations that are acceptable to all interested parties can be quite difficult, particularly where the asset is, for example, an ownership share in a closely held company. *Valuation Handbook* brings certainty to the table by providing a comprehensive guide to valuation. It can help untangle any valuation issue by providing coverage of the full range of asset classes—stocks, bonds, artwork, real estate, intellectual property and closely held businesses—illustrated with in-depth examples for step-by-step guidance, with special direction on the sale of an interest in a closely held company.



S 1 volume, loose-leaf, updated annually, Pub. #01464, ISBN 9781422406762, eISBN 9781579114770
Estimated renewal cost: \$663

STATE RESOURCES

Like many other areas of law, each state has its own system of laws and regulations. Effective estate planning requires practitioners to be well versed in the laws of the state where the client's assets are located.

Midwest Transaction Guide for Estate Planning

Samuel H. Young (Illinois); William J. Dale Jr. (Indiana); Howard J. Gourwitz (Michigan); Benson J. Barr (Michigan)

This two-volume set is a guide to estate planning, covering current business practices, procedures and forms in Illinois, Indiana and Michigan. It summarizes state and federal law, relevant statutes, regulations and secondary legal sources, as well as coverage of the law of wills, trusts, and personal, charitable and anatomical gifts.

NS 2 volumes, loose-leaf, updated annually, Pub. #02466, ISBN 9781522133445, eISBN 9781522133452
Estimated upkeep cost: \$179

CALIFORNIA

California Guide to Tax, Estate & Financial Planning for the Elderly

Stuart D. Zimring, Donna R. Bashaw

California practitioners who specialize in elder law and estate planning or maintain a general practice will benefit from *California Guide to Tax, Estate & Financial Planning for the Elderly*. This practice guide places the range of issues facing the elderly in the context of California law, and provides rich, in-depth discussions on an array of topics, including Medi-Cal, taxes, nursing homes and home health care agencies, and planning for incapacity. In addition, hundreds of practice notes provide useful tips, and cautionary notes pinpoint possible areas of concern.

S 1 volume, loose-leaf with downloadable content, updated annually, Pub. #01053, ISBN 9780820550688, eISBN 9781579118853
Estimated renewal cost: \$401

CONNECTICUT

LexisNexis® Practice Guide: Connecticut Estate Planning

Victoria Spellman

Written by a leading estate planner in Connecticut, this practice-oriented resource can assist attorneys in protecting their clients' interests. It provides practice tips, examples and forms crucial to effective estate planning, including in-depth analysis of topics such as: the fundamentals of estate planning; preparing for the client meeting; planning for the lifetime needs of the client; trusts and wills; and elder law planning.

NS 1 volume, softbound, replaced annually, Pub. #02338, ISBN 9781663306470, eISBN 9781663306487
Prior edition cost: \$265

LexisNexis® Practice Guide: Connecticut Probate and Estate Administration

James I. Dougherty, Louis R. Piscatelli

This resource guides attorneys through the probate and estate administration process in Connecticut. The authors share practice tips gathered through years of practice in this field, as well as in-depth analysis of numerous topics, including: applicable Connecticut law; probate proceedings; asset inventory; and fiduciary management of the estate. This practice guide also includes all the forms, letters and other documents necessary for probate and estate administration.

NS 1 volume, softbound, replaced annually, Pub. #02340, ISBN 9781663303080, eISBN 9781663303097
Prior edition cost: \$265

DISTRICT OF COLUMBIA

Wills, Trusts and Estates for the D.C. Area Practitioner

Virginia A. McArthur, Nicholas D. Ward, August Zinsser III

This practice guide provides insightful analysis and nearly every form an attorney needs for probate law, estate planning and administration in Washington, D.C., Maryland and Virginia, and includes a variety of clauses and forms coupled with extensive commentary and detailed annotations with the specific characteristics of the local law on that subject. Forms include: a will preparation checklist and client interview sheet; living wills for D.C. and Maryland; and health care power of attorney forms for D.C., Maryland and Virginia.

NS 1 volume, loose-leaf with downloadable content, updated annually, Pub. #01277, ISBN 9780820554815, eISBN 9781579112912
Estimated upkeep cost: \$273

FLORIDA

Florida Estates Practice Guide

From will drafting to estate administration, *Florida Estates Practice Guide* covers aspects of estate practice in Florida. In addition to downloadable forms—including checklists and new official forms—this resource provides: basic estate planning considerations in Florida; guidance on preparing tax returns related to estate administration; tax analysis; the text and analysis of relevant Florida statutes; and much more.

- S** 4 volumes, loose-leaf with downloadable content, updated 3 times per year, Pub. #00737, ISBN 9780820517377
Estimated renewal cost: \$2,500

LexisNexis® Practice Guide: Florida Estate and Probate Practice

This practice guide is essential for Florida attorneys facing estate planning or probate issues on behalf of their client. It covers the many activities related to Florida estate and probate practice, including basic estate planning, wills, tax implications, homestead rights, intestate succession, asset administration and more. Included checklists and forms are invaluable to daily practice.

- NS** 2 volumes, loose-leaf, updated annually, Pub. #01386, ISBN 9780820563893, eISBN 9781579118907
Estimated upkeep cost: \$376

Publications From The Florida Bar

Asset Protection in Florida, Sixth Edition

Covering the facets of asset preservation for Florida residents, this guide provides comprehensive analysis of the various methods of protecting assets from creditors' claims, both before and after the owner's death. Among the many topics covered are: homestead; trusts (both domestic and offshore); business planning; protection of retirement and education accounts; and the ethical aspects of advising clients on asset protection issues. In addition, bankruptcy issues and tax planning are prominently featured throughout the guide.

- NS** 1 volume, hardbound, Pub. #22680, ISBN 9781522190448, eISBN 9781522190455
Prior year cost: \$211

Basic Estate Planning in Florida, Tenth Edition

This popular, single-volume manual covers basic estate planning in Florida. Get robust analysis and discussion on issues such as tax and accounting matters, ethical considerations, and problems related to specific forms of ownership and special classes of persons. Also featured are homestead considerations and handling of assets acquired in community property jurisdictions.

- NS** 1 volume, hardbound, Pub. #22894, ISBN 9781522194439, eISBN 9781522194446
Prior year cost: \$211

GEORGIA

Georgia Estate Planning, Will Drafting and Estate Administration Forms

Benjamin T. White, Bertram L. Levy

A comprehensive guide for Georgia practitioners, this well-indexed resource is filled with straightforward explanations of complex estate planning concepts and provides a clear understanding of both the Georgia and federal estate and gift tax systems. In each chapter, find insightful commentary and analysis, together with hundreds of time-tested forms, alternate clauses, checklists, sample letters and tax return schedules.

- NS** 3 volumes, loose-leaf with downloadable content, updated annually, Pub. #80951, ISBN 9780327103387,
Estimated upkeep cost: \$275
- NS** Treatise only, 3 volumes, loose-leaf, updated annually, ISBN 9780871890627, eISBN 9780327168508
Estimated upkeep cost: \$275

ILLINOIS

Illinois Estate Planning, Will Drafting and Estate Administration Forms, with Practice Commentary, Fourth Edition

David A. Berek

Illinois practitioners turn to this guide to serve the needs of their clients. Comprehensive and up to date, it covers topics such as the estate planning process in Illinois, lifetime giving techniques and asset transfers outside of wills and revocable trusts. Well organized and clearly written, it is an indispensable resource for newcomers to the field and experienced practitioners alike.

- NS** 2 volumes, loose-leaf with downloadable content, updated twice per year, Pub. #81109, ISBN 9780769868912
Estimated upkeep cost: \$269
- NS** Treatise only, 2 volumes, loose-leaf, updated twice per year, ISBN 9780769868929, eISBN 9780327193050
Estimated upkeep cost: \$269

LOUISIANA

Louisiana Estate Planning, Will Drafting and Estate Administration with Forms, Second Edition

Max Nathan Jr., Carole Cukell Neff

This three-volume publication is a master set of ready-to-adapt legal forms designed to save practitioners hours of valuable time drafting wills, trusts, charitable bequests, tax returns, and dozens of other forms and pleadings that are part and parcel of Louisiana estate planning and administration, coupled with guidance on complying with Louisiana and federal law.

- NS** 3 volumes, loose-leaf with downloadable content, updated annually, Pub. #81329, ISBN 9780327002604
Estimated upkeep cost: \$200
- NS** Treatise only, 3 volumes, loose-leaf, updated annually, ISBN 9780327124290, eISBN 9780327178934
Estimated upkeep cost: \$200

ESTATE PLANNING AND ADMINISTRATION (continued)

LOUISIANA (continued)

Louisiana Successions, Third Edition

Joseph A. Prokop Jr.

A practical tool for Louisiana practitioners, this title provides an overview of the substantive and procedural Louisiana law of estates. The author—a Baton Rouge-based certified estate planning specialist—packed this start-to-finish guide with aids for preparing succession pleadings. A comprehensive checklist for the administration of successions and adaptable forms for various court pleadings are also included.

NS 2 volumes, loose-leaf with downloadable content, updated annually, Pub. #68800, ISBN 9780769856179, eISBN 9780327181422
Estimated upkeep cost: \$268

MARYLAND

Maryland Estate Planning, Will Drafting and Estate Administration Forms, Second Edition

Albert S. Barr III, A. MacDonough Plant, Adena W. Testa

This title combines commentary on Maryland estate and trust law with numerous forms and checklists for practical use.

NS 2 volumes, loose-leaf with downloadable content, updated annually, Pub. #81584, ISBN 9780327039174, eISBN 9781579118921
Estimated upkeep cost: \$349

MASSACHUSETTS

Estate Administration in Massachusetts with Forms, Third Edition

Michael H. Riley

This resource covers all aspects of estate administration in the Commonwealth of Massachusetts. From rich analysis of problems arising before administration, to administering the estate, to contested proceedings, it guides the practitioner through the estate administration process. In addition to more than 70 filled-in forms, it also provides probate and family court filing fees.

NS 1 volume, loose-leaf, updated annually, Pub. #81517, ISBN 9780769892955, eISBN 9780769892962
Estimated upkeep cost: \$178

Massachusetts Estate Planning, Will Drafting, and Estate Administration Forms, Second Edition

John H. Clymer, Robert G. Bannish, Katherine L. Babson Jr.

This title covers Massachusetts estate planning, probate and estate administration, and includes forms and checklists.

NS 2 volumes, loose-leaf with downloadable content, updated annually, Pub. #81473, ISBN 9780327124405
Estimated upkeep cost: \$174

NS Treatise only, 2 volumes, loose-leaf, ISBN 9780327007975, eISBN 9780327168324
Estimated upkeep cost: \$192

MICHIGAN

LexisNexis® Practice Guide: Michigan Estate Planning

Dustin S. Foster, Sara A. Schimke

With clear and concise explanations of the fundamentals of Michigan estate planning practice, checklists to help ensure nothing is missed, expert practice tips and alerts to potential pitfalls, this resource is designed to help attorneys formulate effective estate plans. In addition, this practice guide incorporates both official and unofficial forms needed to complete the estate planning process.

NS 1 volume, softbound, replaced annually, Pub. #81711, ISBN 9781663306135, eISBN 9781663308160
Prior edition cost: \$198

MINNESOTA

LexisNexis® Practice Guide: Minnesota Estate Planning, 2020 Edition

Philip J. Ruce

This convenient practice guide can assist Minnesota attorneys who are new to the estate planning practice area. From the initial client phone call, to drafting effective distribution language and coordinating tax-qualified retirement accounts, this resource walks the new estate planning practitioner through planning concepts and best practices for effective representation, and includes expert practice tips and alerts to issues of potential concern.

NS 1 volume, softbound, replaced annually, Pub. #02907, ISBN 9781663307705, eISBN 9781663307712
Prior edition cost: \$196

MISSOURI

LexisNexis® Practice Guide: Missouri Estate Law, 2020 Edition

Daniel V. Hiatt Jr.

Provides step-by-step guidance in the key areas of estate planning, as well as the information and answers needed to protect the client's interests. This up-to-date guide is packed with forms, practice tips and references to relevant cases and statutes, as well as rich analysis on a range of topics, including basic estate planning, power of attorney, health care decision planning, wills, non-probate transfers and revocable trusts.

NS 1 volume, softbound, replaced annually, Pub. #02916, ISBN 9781663302601, eISBN 9781663302618
Prior edition cost: \$228

NEW JERSEY

New Jersey Estate Planning, Will Drafting and Estate Administration Forms

Alvin C. Martin, Robert D. Borteck

Written and compiled by experts in New Jersey estate planning law, this resource provides not only thorough discussions and analyses, but also forms, alternate wordings, checklists for attorney and client, sample letters and tax schedules—everything practitioners need to plan and administer estates precisely and thoroughly.

NS 2 volumes, loose-leaf with downloadable content, updated annually, Pub. #82096, ISBN 9780327131724
Estimated upkeep cost: \$292

NS Treatise only, 2 volumes, loose-leaf, updated annually, ISBN 9780327131731, eISBN 9781579119133
Estimated upkeep cost: \$263

New Jersey Estate Law, 2020 Edition (Greenbook)

This resource is a compact, portable repository of New Jersey estate law. Practitioners benefit from robust analytical materials focused on New Jersey statutory titles relevant to estates, from administration of estates to taxes. In addition, it compiles the estate-related statutory sections and court rules, and provides numerous forms and cross-references to key court decisions.

NS 1 volume, softbound, replaced annually, Pub. #20026, ISBN 9781522195733, eISBN 9781522195740
Prior edition cost: n/a

NEW YORK

LexisNexis® AnswerGuide™: New York Surrogate's Court, 2021 Edition

Joshua S. Rubenstein

Topically organized and procedurally driven, this title guides New York practitioners to the answers they need with checklists, practice pointers, citations to seminal cases and precise references to codes and court rules. It covers the full range of estates-related issues governed by the SCPA and the CPLR.

NS 1 volume, softbound, replaced annually, Pub. #01346, ISBN 9781663306791, eISBN 9781663306807
Prior edition cost: \$288

NYSBA® Surrogate's Court Forms

With forms for all 62 counties, the documents contained in this fully automated program are developed jointly with the New York State Bar Association and the New York county clerks. Practitioners can eliminate repetitive typing and duplicative proofreading; create customized contact lists for attorneys and courts that can be inserted into forms with a click; and access statutory material directly from forms, allowing them to check statutes or conduct research quickly.

S Downloadable content, updated annually, Pub. #02539, ISBN 9780820541167
Estimated renewal cost: \$1,101

NYSBA members may receive a discount. Call 800.223.1940 for more information.

NEW YORK (continued)

New York Civil Practice: Estates, Powers and Trusts Law

Nomi N. Zomick

This guide analyzes New York trusts and estates law and is organized by code section of the New York Estates, Powers & Trusts Law for ease of use. It provides the substantive law of wills, trusts, family rights, perpetuities, accumulations, fiduciaries' powers, powers of appointment and charitable trusts.

S 7 volumes, loose-leaf, updated twice per year, Pub. #00806, ISBN 9780820518060, eISBN 9780327170853
Estimated renewal cost: \$5,114

New York Civil Practice: Surrogate's Court Procedure Act

R. Mark Davis

A comprehensive guide covering the law governing proceedings brought in Surrogate's Court, this multi-volume set includes the full text of the New York Surrogate's Court Procedure Act. Arranged by SCPA section for ease of use, it provides textual analysis of every section, together with up-to-date case law developments, statutory amendments and rule changes. In addition, insightful practice tips throughout the text help practitioners navigate proceedings in the Court.

S 6 volumes, loose-leaf, updated twice per year, Pub. #00808, ISBN 9780820518084, eISBN 9780327170587
Estimated renewal cost: \$4,877

New York Estate Administration, 2021 Edition

Margaret V. Turano, Hon. C. Raymond Radigan

This concise and fully updated reference guide covers the basics of estate administration in New York.

NS 1 volume, softbound, replaced annually, Pub. #68900, ISBN 9781663306265, eISBN 9781663306890
Prior edition cost: \$275

New York Estates, Powers & Trusts Law, 2020 Edition

This publication provides the full text of the New York Estates, Powers & Trusts Law.

NS 1 volume, loose-leaf, updated annually, Pub. #69155, ISBN 9781522196556, eISBN 9781522196563
Prior edition cost: \$48

New York Practice Guide: Probate and Estate Administration

Ami S. Longstreet, Anne B. Ruffer

This set provides a "how-to" approach to all phases of New York probate and estate administration.

NS 2 volumes, loose-leaf, updated annually, Pub. #00522, ISBN 9780820515229, eISBN 9781579111366
Estimated upkeep cost: \$1,103

NEW YORK (continued)

New York Surrogate's Court, 2021 Edition (Greenbook)

The *Greenbook* contains the full text of the SCPA, the EPTL and the Uniform Rules for the Surrogate's Court. Also includes the official forms for use in Surrogate's Court, Surrogate's Court Directory and a Topical Index.

- NS** 1 volume, softbound with current supplement, replaced annually, Pub. #00781, ISBN 9781663306647, eISBN 9781663306654
Prior edition cost: \$191

NYSBA® Automated Estate Planning System

Michael E. O'Connor

Make short work of drafting customized estate planning documents. This dynamic, fully automated document-assembly drafting system eliminates the need for repetitive typing, cutting and pasting, and the risk of errors inherent in composing forms by hand. Find what's needed for effective estate planning—wills and trusts, codicils, pre- and post-marital agreements, power of attorney and much more. Each form was drafted and used in practice by Syracuse-based attorney Michael O'Connor, who brings more than four decades of New York estate planning experience to this system. New and revised forms are released annually, keeping the system current.

- S** Downloadable content, updated annually, Pub. #02371, ISBN 9781522114772
Estimated renewal cost: \$1,383

NYSBA members may receive a discount. Call 800.223.1940 for more information.

Warren's Heaton on Surrogate's Court Practice, Seventh Edition

Since 1907, *Warren's Heaton* has been the recognized authority on probate and estate administration in the New York Surrogate's Court. In fact, this set has been cited no fewer than 391 times by state and federal courts throughout New York state, including 25 times by the New York Court of Appeals, the state's highest court.

- S** 15 volumes, loose-leaf, updated twice per year, including bimonthly Legislative and Case Digest, Pub. #00780, ISBN 9781422406571
Estimated renewal estimate: \$8,679
- S** Journal, 6 issues per year, Pub. #00780, ISBN 9780769884004
Estimated renewal cost: \$562

Legislative and Case Digest also sold separately.

NORTH CAROLINA

LexisNexis® Practice Guide: North Carolina Estate Planning, 2021 Edition

Sabrina Winters

Authored by an estate planner in North Carolina, this practice guide provides concise discussions of North Carolina estate planning principles, complete with in-depth analysis of the fundamentals of estate planning, preparing for the client meeting, trusts, wills and power of attorney.

- NS** 1 volume, softbound, replaced annually, Pub. #02434, ISBN 9781663309464, eISBN 9781663309471
Prior edition cost: \$241

OKLAHOMA

Oklahoma Estate Planning, Will Drafting and Estate Administration Forms

This two-volume set is an extensive drafting guide and a valuable practice manual for elder law and estate planning attorneys in Oklahoma.

- NS** 2 volumes, loose-leaf with downloadable content, updated annually, Pub. #82238, ISBN 9780327009085, eISBN 9781522118879
Estimated upkeep cost: \$323
- NS** Treatise only, 2 volumes, loose-leaf, updated annually, ISBN 9780327138846, eISBN 9780327167983
Estimated upkeep cost: \$323

PENNSYLVANIA

LexisNexis® Practice Guide: Pennsylvania Estate Planning, 2020 Edition

William C. Hussey II

This guide combines concise treatment of Pennsylvania estate planning principles and a broad overview of the estate planning process. Ideal for attorneys new to estate planning practice and experienced practitioners alike, this edition provides a fundamental working knowledge of key principles relevant to estate planning practice in general, and Pennsylvania in particular. The author is a highly experienced practitioner, serving as chair of the tax and estates practice group in the Philadelphia office of a renowned Pennsylvania law firm.

- NS** 1 volume, softbound, replaced annually, Pub. #02334, ISBN 9781663301833, eISBN 9781663301840
Prior edition cost: \$285

TEXAS

Texas Estate Planning

William H. Byrnes

This must-have guide explains current federal and Texas statutory and case law, and provides hundreds of forms—with explanations of how best to apply them—to help practitioners draft wills, trusts, durable powers of attorney and more.

- NS** 2 volumes, loose-leaf, updated annually, Pub. #00238, ISBN 9780820512389, eISBN 9781579112790
Estimated upkeep cost: \$855

PROBATE

STATE RESOURCES

Probate and estate administration are multi-step and often complicated matters involving a variety of issues and obstacles. From valuation of a decedent's assets, to paying creditors and taxes, to determining the rightful heirs and distributing remaining assets to them, there are specific steps practitioners must follow. Each state has its own procedures and laws governing all aspects of the processes.

CALIFORNIA

California Probate Practice

This authoritative set provides start-to-finish guidance for handling a decedent's estate in California. Focusing on essential law and procedure, practitioners are kept up to date on important changes in the California Probate Code, provided advice on ethical issues, and guided through the complex probate procedures. With timesaving checklists, this work provides a wealth of information, including: practice tips; a step-by-step overview of the entire estate handling process; mandatory and elective procedures in estate administration; examples of non-judicial forms and illustrated tax forms with instructions; and cites and references to cases, statutes, law reviews and periodicals.

S 4 volumes, loose-leaf, updated twice per year, Pub. #00015, ISBN 9780820510156, eISBN 9781579110468
Estimated renewal cost: \$713

California Probate Procedure, Sixth Edition

Hon. Arthur K. Marshall, Andrew S. Garb

This procedural guide provides a thorough summary of probate law in California. With numerous citations to the Probate Code and the Judicial Council forms, up-to-date, relevant cases interpreting the Code, and references to the Law Revision Commission's comments on the most recent amendments, this edition helps attorneys navigate any probate matter, including: probating a will; appointing executors; obtaining orders of appraisal; and assigning guardianship and conservatorship.

NS 2 volumes, loose-leaf, updated annually, Pub. #80258, ISBN 9780327001256, eISBN 9781579111878
Estimated upkeep cost: \$276

Parker's 2021 California Probate Code

NS 1 volume, softbound with eBook, replaced annually, Pub. #21242, ISBN 9781663308801, eISBN 9781663308818
Prior edition cost: \$98

Deering's Probate Code, 2021 Edition

NS 1 volume, hardbound, replaced annually, Pub. #21110, ISBN 9781663308528, eISBN 9781663308535
Prior edition cost: \$152

NS 1 volume, softbound, replaced annually, Pub. #21100, ISBN 9781663308597
Prior edition cost: \$98

FLORIDA

LexisNexis® Automated Florida Probate Forms

Experience the fast, fully automated and convenient way to complete the forms needed in Florida probate matters. A series of easy-to-follow prompts guides users through the process of entering client and case information. With a single click, the program automatically inserts the information throughout the form into the appropriate format. Save the information to an answer file and use it to complete other forms for the same client. And because the official forms are prepared by The Florida Bar, practitioners can use them with confidence.

S Downloadable content, updated annually, Pub. #02551, ISBN 9780820550213
Estimated renewal cost: \$1,057

Publications From The Florida Bar

The Florida Bar Probate System, Fifth Edition

Rohan Kelley, Tae Kelley Bronner

Written by renowned Florida estate practitioners, this guide includes rich analysis of all aspects of estate administration, including probate tax issues. This comprehensive resource provides over 150 pleading and practice forms, including: forms and notices that need to be filed by the court or with creditors, beneficiaries or heirs; service requirements and statutory and rule authority for each form; sample letters to send to banks, appraisers, the IRS and other persons or entities with interests in the estate; and much more.

NS 2 volumes, loose-leaf, updated annually, Pub. #22871, ISBN 9781632846129
Prior year cost: \$525

Publications From The Florida Bar (continued)

Florida Probate Code Manual

This manual provides comprehensive coverage of estate administration and guardianship matters. Complete with a full set of practice forms for probate and guardianship from the Florida Lawyers Support Services, Inc. (FLSSI), as well as citations and summaries of relevant and recent court decisions, this resource covers the facets of probate and estate administration, including: intestate succession; rights of the surviving spouse, children and creditors; methods of administration; and appointment and removal of guardians. The Florida Probate Code and Probate Rules are also included.

S 4 volumes, loose-leaf, updated 4 times per year, Pub. #80736, ISBN 9780409260625, eISBN 9780327171591
Estimated renewal cost: \$806

Florida Probate Rules and Rules of Judicial Administration, 2021 Edition

Features the full text of the Florida Probate Rules, Rules of Civil Procedure, and the Rules of Judicial Administration, including three-year cycle amendments, with the committee notes, rule histories, and statutory and rule references for each rule. It also includes critical constitutional and statutory black-letter law—such as Title XLII, Estates and Trusts, and Chapter 198, Estate Taxes—and essential statutes governing other key areas, such as: investment by fiduciaries and financial institutions; developmental disabilities; and real and personal property.

NS 1 volume, softbound, replaced annually, Pub. #22736, ISBN 9781663313201
Prior edition cost: \$69

Litigation Under Florida Probate Code, Twelfth Edition

When litigation appears unavoidable, experienced Florida probate practitioners provide the guidance needed to navigate complex issues, such as homestead, will construction proceedings, creditors' claims and compensation disputes. Recent statutory and rules changes, as well as the latest court decisions, are analyzed. Also included is robust discussion of various hot-topic issues, including actions on behalf or against estates, safe harbor language and party substitution in wrongful death claims.

NS 1 volume, hardbound, Pub. #22778, ISBN 9871522195313, eISBN 9781522195320
Prior edition cost: \$211

Practice Under Florida Probate Code, Tenth Edition

A comprehensive, step-by-step guide through estate administration, this publication covers alerts to relevant tax considerations and legislative and rule amendments, together with citations to recent court decisions, to help ensure sound administration. The guide also provides timesaving forms, sample accountings and rich analysis of key issues, including: remote/online notarization; unclaimed property; application of the Florida Fiduciary Access to Digital Assets Act; homestead waiver right; and new forms regarding homestead.

NS 1 volume, hardbound, Pub. #22811, ISBN 9781522193043, eISBN 9781522193050
Prior edition cost: \$330

INDIANA

Henry's Indiana Probate Law and Practice

John A. Cremer, Daniel R. Gordon, Jeffrey B. Kolb

Highly experienced Indiana estate planning and probate attorneys preserve Henry's century-old legacy as a trusted resource. This respected treatise covers the Indiana Probate and Trust Codes, analyses of recent legislative changes and court decisions, and hundreds of valuable, timesaving forms.

NS 8 volumes, loose-leaf, updated annually, Pub. #62794, ISBN 9780327164326, eISBN 9780327182580
Estimated upkeep cost: \$507

Indiana Estate Planning and Probate Practice

Daniel R. Gordon

Experienced Indiana practitioners composed this multi-volume, comprehensive treatise and form book for effective estate planning and administration. Designed for maximum efficiency, each chapter features a Scope, Synopsis, Legal Background and Research Guide, Practice Guide, and Forms with comments and instructions. With exhaustive coverage of estate planning and will drafting, guidance through each stage of probate, and detailed treatment of tax planning and returns, both new and experienced practitioners will find this resource indispensable.

S 4 volumes, loose-leaf with downloadable content, updated twice per year, Pub. #00493, ISBN 9780820520865
Estimated renewal cost: \$883

S Treatise only, loose-leaf, ISBN 9780820514932, eISBN 9781579114251
Estimated renewal cost: \$1,036

KENTUCKY

Kentucky Probate, Second Edition

W. Allen Schmitt, Glen S. Bagby

This manual is organized with information needed to process and document common probate actions. With an easy-to-use format, it includes an overview of Kentucky probate basics, fact-gathering data sheets for recording vital information, step-by-step guidance through the administration of an estate, sample letters and forms.

NS 1 volume, loose-leaf, updated annually, Pub. #68750, ISBN 9780327019282, eISBN 9780327182757
Estimated upkeep cost: \$279

MICHIGAN

LexisNexis® Automated Michigan SCAO Forms

This fully automated system contains over 800 forms, most of them official forms from Michigan's State Court Administration Office (SCAO), the Bureau of Commercial Services and various federal agencies.

S Downloadable content, updated annually, Pub. #02584, ISBN 9780820554440
Estimated renewal cost: \$943

MICHIGAN (continued)

LexisNexis® Practice Guide: Michigan Probate and Estate Administration, 2020 Edition

Dustin S. Foster, Sara A. Schimke

This *Practice Guide* provides clear and concise explanations of the fundamentals of Michigan probate and estate administration practice, checklists to ensure that the salient points in any transaction are addressed, practice tips for both beginning and experienced practitioners, and alerts to traps for the unwary practitioner. With both the official and unofficial forms needed for the estate administration process, this is the one-stop resource for probate and administration in Michigan.

NS 1 volume, softbound, replaced annually, Pub. #02335, ISBN 9781663308238, eISBN 9781663308221
Prior edition cost: \$196

MINNESOTA

Stein on Probate: Administration of Decedents' Estates Under the Uniform Code as Enacted in Minnesota, Fourth Edition

Robert A. Stein, original author; Marya Robben, update author

Cited nine times by the Minnesota Court of Appeals, this respected resource discusses and analyzes the rules and procedures governing the administration of a decedent's estate, including Minnesota's income tax, inheritance tax and estate tax collection procedures. In addition to guidance and practice tips on each stage of estate administration, practitioners will find: relevant statutes; the Multi-Party Accounts Act; Minnesota inheritance tax law; federal estate tax law; and the various Minnesota county court rules pertaining to probate proceedings.

NS 1 volume, loose-leaf, updated annually, Pub. #81889, ISBN 9780327164074, eISBN 9781579118938
Estimated upkeep cost: \$175

MISSOURI

LexisNexis® Practice Guide: Missouri Probate and Estate Administration, 2020 Edition

Bradley J. LaBruyere

This *Practice Guide* provides comprehensive coverage of probate and estate administration in Minnesota, including governing law and jurisdiction, identifying heirs and beneficiaries, creditor claims, and small estates.

NS 1 volume, softbound, replaced annually, Pub. #02904, ISBN 9781663306883, eISBN 9781663303906
Prior edition cost: \$228

NEW HAMPSHIRE

New Hampshire Practice Series: Probate and Administration of Estates, Trusts & Guardianships, Fourth Edition

Charles A. DeGrandpre, William V.A. Zorn

This set offers practical insight into probate court procedure and the administration of estates in New Hampshire. It contains practical advice, analysis of current law, checklists and completed forms used in probate proceedings.

NS 3 volumes, hardbound with current supplement, Pub. #82040, ISBN 9781422429679
Estimated upkeep cost: \$200

Vols. 10 – 12 of the *New Hampshire Practice Series*

NEW JERSEY

LexisNexis® Practice Guide: New Jersey Probate and Estate Administration, 2020 Edition

Peggy Sheahan Knee

This title provides quick, New Jersey-specific answers to questions that arise in day-to-day probate practice and estate administration.

NS 1 volume, softbound, replaced annually, Pub. #01443, ISBN 9781522191490, eISBN 9781522191506
Prior edition cost: \$308

OHIO

Anderson's Ohio Probate Practice and Procedure

Marilyn J. Maag

This comprehensive, annotated practice guide explores facets of Ohio probate procedure in chronological order, with detailed step-by-step guidance through the process. This guide offers in-depth analysis of all probate-related topics, including adoptions, estates and trusts, care and treatment for the mentally handicapped, and anatomical gifts. Ready-to-use word processor versions of forms drafted by the author, as well as Standard Probate Forms and other official forms used by government agencies, are also included.

NS 2 volumes, loose-leaf with downloadable content, updated annually, Pub. #04328, ISBN 9780769869032, eISBN 9780327194125
Estimated upkeep cost: \$582



Need content in a hurry?

Order eBooks directly at [lexisnexis.com/store](https://www.lexisnexis.com/store).

PROBATE (continued)

OHIO (continued)

Ohio Annotated Probate Laws Handbook, 2020 Edition

This portable handbook is designed for judges, attorneys and other professionals who need quick reference to Ohio probate statutes and court rules. In addition to providing both the Ohio Trust Code and Probate Court provisions in their entirety, this work also pinpoints those code sections affected by recent legislation. Practitioners will also benefit from more than 100 Standard Probate Forms prescribed by the Ohio Supreme Court.

NS 1 volume, softbound, replaced annually, Pub. #33075,
ISBN 9781522196884, eISBN 9781522196891
Prior edition cost: \$148

Ohio Probate, Second Edition

Provides forms, checklists and practical guidance regarding the various procedures involved in the Ohio probate process.

NS 1 volume, loose-leaf, updated annually, Pub. #68950,
ISBN 9780327134411
Estimated upkeep cost: \$486

PENNSYLVANIA

LexisNexis® Practice Guide: Pennsylvania Probate and Estate Administration, 2020 Edition

Suellen Wolfe

With its concise, on-point discussion of the probate and estate administration processes in Pennsylvania, this *Practice Guide* offers analysis of topics such as will contests; claims against the estate and rights of creditors; distribution of the estate; and death taxes. Dozens of forms and checklists help practitioners draft sound documents and ensure that all steps in a process have been completed. Expert practice tips provide insight to resolving potential problematic issues.

NS 1 volume, softbound, replaced annually, Pub. #02326,
ISBN 9781522199540, eISBN 9781522199557
Prior edition cost: \$285

Remick's Pennsylvania Orphan's Court Practice

This multi-volume treatise provides what practitioners need for probate and estate administration proceedings in the Orphans' Court. It offers in-depth analysis and practice tips for the process, including grant of letters, accountings, distribution and fiduciaries. The full text of relevant statutes and timesaving forms across every area of estates law are included.

NS 7 volumes, hardbound with current supplement, Pub. #00580,
ISBN 9780820515809, eISBN 9781579117856
Estimated upkeep cost: \$765

TEXAS

Texas Probate, Estate and Trust Administration

This comprehensive treatise provides coverage of probate law and estate and trust administration in Texas, with detailed legal analysis and discussion on topics such as: the independent administration system; guardianships issues; fiduciary duties of personal representatives; and information and tips regarding deadlines, required documents and mandatory procedural requirements under the Probate Code. It also contains: current case law and the latest statutory and regulatory changes; sample forms and letters; and useful charts and diagrams.

S 4 volumes, loose-leaf, updated annually, Pub. #00708,
ISBN 9780820517087, eISBN 9781579118266
Estimated renewal cost: \$1,560

WASHINGTON

LexisNexis® Practice Guide: Washington Probate and Estate Administration, 2020 Edition

Karen E. Boxx

This practice-oriented resource assists attorneys in the probate and estate administration processes in Washington. Written by an experienced Washington estates attorney, this *Practice Guide* covers in-depth analysis topics, including: determining whether probate is necessary; identifying heirs and beneficiaries; creditors' claims; family protection; and estate taxes.

NS 1 volume, softbound, replaced annually, Pub. #02443,
ISBN 9781663306456, eISBN 9781663306463
Prior edition cost: \$312



Overloaded Wi-Fi?

Rely on the **LexisNexis® print portfolio** to focus on your research, not your internet connection.

TRUSTS AND GIFTS

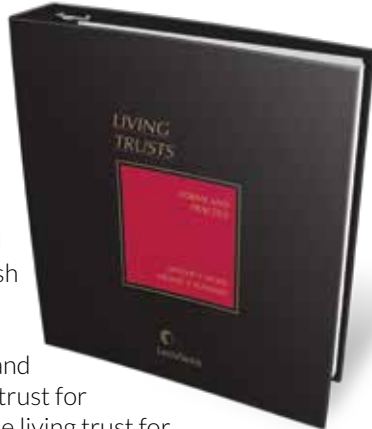
NATIONAL RESOURCES

Wills, trusts and gifts are common tools used by owners of assets to pass them to beneficiaries. The best tool depends on numerous factors, including the owner's wishes, tax implications and even the beneficiary's age.

Living Trusts: Forms and Practice >

*Dwight F. Bickel, original author;
Michael T. Flannery, update author*

Seasoned practitioners and newcomers to living trusts will find this guide indispensable. Practice-oriented features include analysis of the law, together with a comprehensive collection of practice-tested legal forms that can be used to establish and fund living trusts. Among the dozens of documents included in this publication are: simple joint and simple separate, revocable living trust for married persons; simple revocable living trust for unmarried persons; estate tax planning living trusts, with or without QTIP provisions; and beneficiary designation forms.



NS 1 volume, loose-leaf with downloadable content, updated annually, Pub. #00081, ISBN 9780820510811, eISBN 9781579110734
Estimated upkeep cost: \$238

Murphy's Will Clauses: Annotations and Forms with Tax Effects

This comprehensive, multi-volume set provides: in-depth discussions and thoughtful analyses of wills and codicils; federal estate and gift taxation; federal generation-skipping transfer taxation; testamentary trusts; spousal protection; fiduciary duties, powers and liabilities; and much more. In addition, practitioners will find: practice tips and drafting advice; over 1,400 will and trust clauses; numerous complete wills and trusts; checklists; and sample computations.



S 5 volumes, loose-leaf, updated twice per year, Pub. #00441, ISBN 9780820514413, eISBN 9781579117160
Estimated renewal cost: \$3,235

Page on the Law of Wills

Jeffrey A. Schoenblum

This analytical treatise with forms provides a general discussion of the law of wills and their operation, including testamentary capacity, execution formalities and tax considerations, as well as probate and will contests.

NS 8 volumes, hardbound with current supplement and downloadable content, updated annually, Pub. #04476, ISBN 9780870846823, eISBN 9781579110253
Estimated upkeep cost: \$405

Trust Administration and Taxation

Joseph L. Wyatt, Jr., original author; Pamela Revak, update author

This well-documented, practical text on establishment, administration and taxation of trusts covers revocable living trusts, charitable remainder of trusts and more.

S 4 volumes, loose-leaf, updated twice per year, Pub. #00470, ISBN 9780820514703, eISBN 9781579113902
Estimated renewal cost: \$2,908

Trust Department Administration and Operations

Victor P. Whitney, original author; Pamela Revak, update author

This title covers every aspect of setting up a trust department, day-to-day administration, asset management, operations, marketing and internal management.

S 2 volumes, loose-leaf, updated twice per year, Pub. #00754, ISBN 9780820517544, eISBN 9780327168584
Estimated renewal cost: \$1,057

Valuation Handbook

Joni Larson

For complete description, see Estate Planning section, p. 3.

S 1 volume, loose-leaf, updated annually, Pub. #01464, ISBN 9781422406762, eISBN 9781579114770
Estimated renewal cost: \$663

STATE RESOURCES

Trusts provide the framework to allow individuals to leave a legacy for family members. The establishment of a trust involves both tax and non-tax considerations, and as such, certain states, such as New Hampshire and Virginia, allow clients to benefit from income tax advantages. Thus, as with probate and estate administration, each state has its own laws and regulations governing trust law.

CALIFORNIA

California Wills & Trusts

This set provides practitioners with clear, concise guidance on planning, drafting, interpreting and executing wills and trusts in California, coupled with timesaving forms. Plus, the treatise and forms are cross-referenced to each other, making research and drafting more efficient and thorough.

- S** Treatise & forms, 6 volumes, loose-leaf, updated annually, Pub. #00034, ISBN 9780820520100, eISBN 9781579111991
Estimated renewal cost: \$1,542
- S** Treatise only, 3 volumes, loose-leaf, updated annually, ISBN 9780820520070
Estimated renewal cost: \$752

California Wills & Trusts Drafting System

This combination includes the Treatise and Drafting System portions of the *California Wills & Trusts* series for estate planning practitioners. With the treatise, practitioners benefit from clear guidance on planning, drafting, interpreting and executing wills and trusts in California. The Drafting System software provides a fast, fully automated and convenient way to create wills, trusts, powers of attorney and related documents quickly and accurately. To streamline research and drafting, the software includes cross-references to the treatise, so practitioners can easily find practice tips and analysis while using the software.

BEST VALUE!

- S** Complete set, 6 volumes, loose-leaf with downloadable content, updated annually, Pub. #00034, ISBN 9780820529004
Estimated renewal cost: \$2,223
- S** 3 volumes, loose-leaf with downloadable content, updated annually, ISBN 9780820529684
Estimated renewal cost: \$1,547

California Trust Practice

George R. Dirkes, John A. Hartog

Complete with analysis, practice commentary, forms and checklists, this practice guide is a must for lawyers, accountants and financial consultants who advise trustees, especially non-professional trustees. Key sections are conveniently cross-referenced to forms and other treatises, helping practitioners negotiate tricky issues, such as: allocating and distributing assets to the bypass and marital deduction trusts; implementing and using the administrative trust; handling claims by and against post-mortem trusts; and evaluating the need for court supervision.

- NS** 1 volume, loose-leaf with downloadable content, updated annually, Pub. #00073, ISBN 9780820527611, eISBN 9781579110710
Estimated upkeep cost: \$436

Matthew Bender® Practice Guide: California Trust Litigation

John A. Hartog, Shirley L. Kovar

This *Practice Guide* provides up-to-date, practical and authoritative coverage available on trust litigation in California. Key topics include: proceedings attacking the validity and/or existence of a trust (trust contests); disputes involving the ownership of trust property; petitions for instructions relating to the operation of a trust; suits involving claims of breach of duty or malfeasance by the trustee; removal of a trustee; and related matters, such as financial abuse of an elder or dependent adult by a trustee.

- S** 1 volume, loose-leaf, updated twice per year, Pub. #01612, ISBN 9781422478455, eISBN 9781579114855
Estimated renewal cost: \$202

CONNECT WITH US!

[lexisnexis.com/LexisSource](https://www.lexisnexis.com/LexisSource)

@LexisSource

[lexisnexis.com/ContentInsider](https://www.lexisnexis.com/ContentInsider)

FLORIDA

Publications From The Florida Bar

Administration of Trusts in Florida, Tenth Edition

This manual provides in-depth analysis of the Florida Trust Code and amendments to that Code. In addition to a focus on tax considerations, numerous topics are addressed, and practitioners benefit from: discussions on decanting, social investments and self-settled spendthrift trusts outside Florida; elaboration on statutes of limitations regarding trust disclosure documents; trust modification and trust termination; and updates and discussions about rules, statutes and recent case law.

- NS** 1 volume, hardbound, Pub. #22748, ISBN 9781522178071, eISBN 9781522178088
Prior year cost: \$257

Kane's Florida Will and Trust Forms Manual

Based on the comprehensive publication by the late Walter S. Kane, a renowned estate planning attorney, this bundle covers the essential principles of estate planning and provides Florida practitioners with a set of resources for effective and efficient estate planning. It includes: *Florida Will and Trust Forms Manual*, a comprehensive guide packed with analysis and practice tips on planning and drafting wills and trusts; *Florida Will and Trust Deskbook*, which encapsulates relevant Florida and federal statutes and regulations, as well as the Florida Probate Rules; and *LexisNexis® Automated Florida Wills and Trusts Forms*, a dynamic, fully automated system for creating customized wills, trusts, powers of attorney and related documents with speed and accuracy.

BEST VALUE!

- NS** 3 volumes, loose-leaf with deskbook and downloadable forms, Pub. #22877, ISBN 9781422454626
Prior year cost: \$1,167
- NS** 3 volumes, loose-leaf with deskbook, ISBN 9780820587547, eISBN 9780327183099
Prior year cost: \$749
- NS** 1 volume, deskbook only, replaced annually, ISBN 9781663308962
Prior edition cost: \$287
- NS** Downloadable forms only, ISBN 9781522160069
Prior year cost: \$731

NEW HAMPSHIRE

New Hampshire Practice Series: Wills, Trusts and Gifts, Fourth Edition

Charles A. DeGrandpre

This title offers up-to-date coverage of substantive law, current practice and trends for wills, alternatives to wills, the various types of trusts and gifts. It comes complete with practice tips, sample will and trust clauses, fully referenced forms, and coverage of recent statutory revisions and decisions of the New Hampshire Supreme Court.

- NS** 1 volume, hardbound with current supplement, Pub. #82040, ISBN 9780327162841, eISBN 9780327171782
Estimated upkeep cost: \$155

Vol. 7 of the *New Hampshire Practice Series*

NEW YORK

Bloom on New York Wills Law

Andrew L. Martin

This review of the New York law relating to decedents' estate and wills includes up-to-date citations and statutory references.

- NS** 1 volume, loose-leaf, updated annually, Pub. #69176, ISBN 9781630443597, eISBN 9781630444303
Estimated upkeep cost: \$67

Drafting New York Wills and Related Documents, Fourth Edition

Ira Mark Bloom, William P. LaPiana

This two-volume set provides New York practitioners a package of forms, primary source materials and in-depth analysis for drafting effective estate documents, covering drafting wills, revocable trusts, advance directives, and retirement and estate planning.

- S** 2 volumes, loose-leaf with downloadable content, updated twice per year, Pub. #00338, ISBN 9781422483053, eISBN 9781579111311
Estimated renewal cost: \$1,062

OHIO

Anderson's The Simple Will in Ohio, 2020 – 2021 Edition

Marilyn J. Maag, Michelle Wong-Halibi

Follow step-by-step guidance through the process of drafting, executing and amending a simple Ohio will.

- NS** 1 volume, softbound with downloadable content, replaced annually, Pub. #04330, ISBN 9781663303745, eISBN 9781663303752
Prior edition cost: \$189

TRUSTS AND GIFTS (continued)

PENNSYLVANIA

Pennsylvania Transactions: Wills and Trusts

Joseph N. Bongiovanni III, Elisa Bongiovanni,
Joseph N. Bongiovanni IV

This comprehensive treatise can help Pennsylvania practitioners devise effective and thorough estate plans for their clients. Organized to find up-to-date substantive law, procedural guidance, and critical documents and forms, this guide covers: aspects of wills and estate plans; fiduciaries and testamentary trusts; and gifts and living trusts.

NS 3 volumes, loose-leaf, updated annually, Pub. #02454,
ISBN 9781522130765, eISBN 9781522130772
Estimated upkeep cost: \$179

TENNESSEE

Pritchard on Wills and Administration of Estates, Seventh Edition

Jeffrey Mobley, Jack W. Robinson Sr., Andra J. Hedrick

Over its 127-year existence, this authoritative reference has become indispensable to the Tennessee bench and bar. Combining analysis and black letter with procedural and practical tips, this work covers topics such as: testamentary capacity and power; probate of wills; payments, distributions and settlements; taxes; will clauses; complete will forms; probate forms; references; links to relevant, up-to-date Tennessee statutes and court decisions; and much more.

NS 3 volumes, hardbound with current supplement,
Pub. #66040, ISBN 9781422476895,
eISBN 9780327168270
Estimated upkeep cost: \$261

VIRGINIA

Harrison on Wills and Administration for Virginia and West Virginia, Fourth Edition

James P. Cox III

A classic legal reference since 1927, this set addresses will drafting, estate planning, probate and estate administration in Virginia and West Virginia. Practitioners get robust analysis on living wills, descent and distribution, revocation of wills, and the probate process. Also included are relevant Uniform Trust Code provisions, court decisions and legislative enactments affecting trusts and estates for both states, and an entire chapter filled with timesaving forms.

NS 2 volumes, loose-leaf, updated twice per year,
Pub. #62781, ISBN 9781422421789,
eISBN 9780327171096
Estimated upkeep cost: \$336

ELDER LAW

NATIONAL RESOURCES

Elder law practitioners wear many hats, from devising effective estate plans, drafting wills and establishing trusts, to guardianship matters for dependents, to assisting with long-term health care plans and guarding against physical and financial elder abuse.

Long-Term Care Advocacy

This resource focuses exclusively on long-term care issues regarding nursing and residential care facilities. With its practical approach to dealing with the challenges that often arise when long-term care becomes necessary, this unique resource helps practitioners navigate a variety of tasks, including: choosing the best type of facility for the client; facility admissions policies and admissions agreements; qualifying for Medicare or Medicaid payments; financial protection for the client's spouse; and litigating against a facility. Chapters include state-by-state coverage, highlighting variations between federal law and the laws of all 50 states and the District of Columbia.

NS 1 volume, loose-leaf, updated annually, Pub. #01054,
ISBN 9780820541532, eISBN 9780327168492
Estimated upkeep cost: \$262



Tax Planning for Retirees

Vorris J. Blankenship

"Outliving your retirement" is a phrase often heard and widely feared by those who have recently retired or plan to retire soon. This one-stop guide shows tax and financial professionals how to maximize their clients' retirement nest-egg through strategic tax planning. Written in clear, jargon-free language by noted author, Vorris J. Blankenship, this publication covers: federal tax treatment of everything from IRAs and Social Security benefits to long-term care insurance and disability benefits; guidance for optimizing IRA and 401(k) distributions; and smart estate planning for the protection of retirement benefits.

NS 1 volume, loose-leaf, updated annually, Pub. #01548,
ISBN 9781422471081, eISBN 9780327179962
Estimated upkeep cost: \$323



STATE RESOURCES

State elder law matters can have serious financial and health care consequences. From estate planning, medical decision-making and directives, to Medicaid planning for nursing home and in-home long-term care, to Medicaid estate recovery, every state has regulations to protect older Americans.

ARKANSAS

The Public Employees Retirement System Laws of the State of Arkansas, 2019 Edition

This handy reference encapsulates Arkansas laws governing the state's public employees' retirement system. Get the full text of the applicable eight chapters of Title 24 of the *Arkansas Code Annotated*—with history, effective dates and publisher notes. It also includes selected sections from related Titles of the Code, such as Public Finance and Taxation, as well as the Code of Arkansas Rules and Regulations.

NS 1 volume, softbound, replaced annually, Pub. #33719, ISBN 9781522193159, eISBN 9781522193166
Prior edition cost: n/a

CALIFORNIA

California Public Employees' Retirement Law, 2021 Edition

This one-volume reference contains the California statutes and regulations—as well as selected federal statutes—applicable to the state's public employees' retirement system.

NS 1 volume, softbound, replaced annually, Pub. #21305, ISBN 9781663309914
Prior edition cost: \$63

California Welfare Code Annotated: Elder Law, 2020 Edition

This portable resource covers California WIC statutes pertaining to elder law.

NS 1 volume, softbound, replaced annually, Pub. #33738, ISBN 9781522198963, eISBN 9781522198970
Prior edition cost: \$39

FLORIDA

Publication From The Florida Bar

Florida Guardianship Practice, Tenth Edition

This reference provides concise, comprehensive guidance through this dynamic and often complicated area of law, from pre-guardianship planning through termination. In its analysis of all facets of practice under Florida Statutes Chapter 744, practitioners will find in-depth discussions on topics such as: the Marjory Stoneman Douglas High School Public Safety Act; settlements in incapacity proceedings; guardian liability; involuntary guardianship appointment; guardianships for minors; and attorney's fees.

NS 1 volume, hardbound, Pub. #22829, ISBN 9781522166641, eISBN 9781522165392
Prior year cost: \$257

MARYLAND

Elder Law in Maryland, Fourth Edition

Jason A. Frank


This single, concise volume contains forms and documents conforming to Maryland law, texts of landmark cases and essential checklists.


NS 1 volume, loose-leaf, updated annually, Pub. #60015, ISBN 9780769859538, eISBN 9780327180821
Estimated upkeep cost: \$120


LexisNexis® eBooks

Home or office?

LexisNexis® eBooks—for wherever your work takes you.

 Read easily in a web browser or in your preferred eReader.

 Search for terms and add notes, highlights and bookmarks for more personalized work productivity.

 Link to the Lexis+ and Lexis services for deeper online access to law sources.†

SHOP [lexisnexis.com/eReading](https://www.lexisnexis.com/eReading)

CALL 800.223.1940

ELDER LAW (continued)

MASSACHUSETTS

Massachusetts Legal Practice Library: Guardianship and Conservatorship in Massachusetts, Third Edition

Rebecca Weintraub Brendel, Honorable Jennifer Rivera Ulwick, John G. Dugan

Used by the bench and bar, this practice manual dissects the Massachusetts system governing the appointment of guardians and conservators of mentally disabled individuals and minors. With analysis and robust discussions, coupled with forms and references to critical court decisions, practitioners can tackle the important issues, such as medicating for psychotic symptoms, limiting or expanding a guardian's powers, a ward's right to vote, and whether a child should be removed to the custody of the DSS.

NS 1 volume, hardbound with supplement, Pub. #81523, ISBN 9780769856162, eISBN 9780327181194
Estimated upkeep cost: \$142

Massachusetts Elder Law, Second Edition

William J. Brisk, Whitney A. Alexander

This title provides guidance for both applicable federal law and Massachusetts law with commentary, forms and checklists.

NS 1 volume, loose-leaf, updated annually, Pub. #81400, ISBN 9781422420638, eISBN 9781579118945
Estimated upkeep cost: \$172

NEW JERSEY

LexisNexis® Practice Guide: New Jersey Elder Law, 2020 Edition

Peggy Sheahan Knee, Linda S. Ershow-Levenberg

This is a comprehensive overview of the issues of most relevance impacting older New Jersey residents. The law encompasses a variety of practice areas and this title is directed at practitioners who specialize in the area of elder law.

NS 1 volume, softbound, replaced annually, Pub. #01479, ISBN 9781522186304, eISBN 9781522186311
Prior edition cost: \$269

NEW YORK

New York Elder Law

This companion to *Tax, Estate and Financial Planning for the Elderly*, is a comprehensive, handy "how-to" guide with analysis and forms relating to elder law in New York, including: incisive analysis and commentary on legal and financial issues for property management and health care decisions; Medicaid and spousal impoverishment protection; estate planning and wills; income and estate taxes; and elder abuse.

NS 1 volume, loose-leaf with downloadable content, updated annually, Pub. #01051, ISBN 9781422474747
Estimated upkeep cost: \$440

NORTH CAROLINA

North Carolina Retirement Systems Laws, 2020 Edition

This title contains the full texts of North Carolina statutory provisions that govern the state's various retirement systems for public employees, including: teachers and state employees; local governmental employees; and firefighters and rescue squad workers. It also includes the supplemental retirement income plan.

NS 1 volume, softbound, replaced annually, Pub. #30511, ISBN 9781663312013, eISBN 9781522170181
Prior edition cost: \$153

OHIO

Anderson's Ohio Elder Law Practice Manual, 2021 Edition

Rachel A. Kabb-Effron

This practice manual provides full analysis of federal and Ohio laws pertinent to elder law, as well as relevant portions of the law of selected states, including Kentucky, Indiana and Florida. Practitioners get up-to-date coverage of the many financial and health care planning issues affecting Ohio seniors, including: powers of attorney and durable powers of attorney for health care; living and joint trusts; Medicaid; long-term care and Medigap insurance; and living wills.

NS 1 volume, softbound with downloadable content, replaced annually, Pub. #04331, ISBN 9781663306999
Prior edition cost: \$230

OHIO (continued)

2020 Ohio Elder Law Handbook

A companion book to the *Ohio Family Law* treatise, this portable title expands statutory material by providing the full text of statutes pertaining to elder law, including provisions relating to nursing homes and probate. In addition, it features important administrative code sections critical to the practitioner, including provisions governing food stamps and Medicaid.

NS 1 volume, softbound, replaced annually, Pub. #33054,
ISBN 9781522197072, eISBN 9781522197089
Prior edition cost: \$49

TENNESSEE

Elder Law Practice in Tennessee, Second Edition

Timothy L. Takacs

This resource provides coverage of all aspects of Tennessee elder law. It addresses senior citizens and the law relevant to providing allied services, including: planning for medical, financial and quality of life decisions; setting up a conservatorship; choosing housing options; and planning for long-term care.

NS 1 volume, loose-leaf, updated annually, Pub. #60977,
ISBN 9780327164098, eISBN 9780327168218
Estimated upkeep cost: \$148

VIRGINIA

Virginia Retirement System, 2020 Edition

Containing the full texts of all Virginia statutory provisions that govern the commonwealth's public employees' retirement system, this handy reference is ideal for human resources professionals, active and retired Virginia employees and attorneys practicing pension, benefit or estate law within Virginia. Fully annotated and indexed, it contains *Code of Virginia Title 51.1, Pensions, Benefits, and Retirement*, in its entirety, as well as numerous related code sections and relevant articles from the Constitution of Virginia.

NS 1 volume, softbound, replaced annually, Pub. #35467,
ISBN 9781663303257, eISBN 9781663303264
Prior edition cost: \$69

WASHINGTON

Washington Guardianship Law: Administration and Litigation, Third Edition

Gerald B. Treacy Jr.

This publication brings together the primary resources around guardianship procedures and consolidates them into one volume, with tabs for quick reference. Major topics such as creation, administration, termination and litigation regarding both minors and incapacitated adults, are discussed in detailed analysis that covers the issues in the order in which they typically occur in practice. This manual also provides numerous sample forms, as well as a checklist that takes the practitioner through the necessary steps and procedures.

NS 1 volume, loose-leaf, updated annually, Pub. #82755,
ISBN 9780327124962, eISBN 9780327168430
Estimated upkeep cost: \$153

WEST VIRGINIA

Laws and Rules of the West Virginia Consolidated Public Retirement Board, 2020 Edition

This handy manual contains the full texts of all West Virginia statutory provisions that govern the state's retirement system for public employees. Fully annotated and indexed, it contains the provisions from *Michie's™ West Virginia Code Annotated* related to salary, pensions, benefits, retirement and law enforcement retirement plans. Also includes legislative rules pertaining to the Public Employees Insurance Act and Consolidated Public Retirement Board and a Table of Sections Affected by the latest legislative session.

NS 1 volume, softbound, replaced biennially, Pub. #36474,
ISBN 9781663302885, eISBN 9781663302892
Prior edition cost: \$52



Missing something?

Explore the full portfolio of jurisdictional and practice area coverage at the LexisNexis® Store. Start browsing at [lexisnexis.com/store](https://www.lexisnexis.com/store).



Access eBook publications sooner!
Order eBooks directly at lexisnexis.com/ESTATES

Please send me the following titles:

	PRICE	QTY	SUBTOTAL	S/A	S/N	NS/A	NS/N
ISBN	\$		\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ISBN	\$		\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ISBN	\$		\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ISBN	\$		\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ISBN	\$		\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ISBN	\$		\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ISBN	\$		\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ISBN	\$		\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ISBN	\$		\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ISBN	\$		\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ISBN	\$		\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Shipping and handling are not included and will be invoiced separately.
Prices listed are current as of 3/10/2021. Prices subject to change without notice.

ORDER SUBTOTAL	\$
+ SALES TAX	\$
TOTAL	\$

PAYMENT OPTIONS

- Bill me** Scan and email THIS PAGE, send to:
- Bill my firm**

TO PAY BY **CHECK:** Mail this page and a check made payable to LexisNexis, to:
ATTN: Fulfillment-DM Sales
LexisNexis Matthew Bender
9443 Springboro Pike
Miamisburg, OH 45342

TO PAY BY **CREDIT CARD:** Call

Please fill in completely to ensure proper order fulfillment.

Name _____

Firm _____

LexisNexis Account # _____ NEW CUSTOMER

Address _____

City State ZIP _____

Email _____

Phone () _____

X

Your Signature (required to place your order)

Product Terms

S SERVICE TITLES

Price includes product and any supplementation, release, replacement volume, new edition and/or updates published during the indicated service period (minimum 30 days) at no additional charge except tax, shipping and handling where applicable. Renewal options include:

S/A SERVICE TITLE WITH AUTOMATIC RENEWAL

If you select this option your subscription will be automatically renewed without any action on your part. Notification that the subscription is due to be renewed, and the price of renewal, will be sent to you 60 days prior to renewal. Estimated renewal cost is noted with each title.

S/N SERVICE TITLE WITH NOTIFICATION

Notification that the subscription is due to be renewed, and the price of renewal, will be sent to you 60 days prior to renewal. If you fail to act, your subscription will be canceled.

NS NON-SERVICE TITLES

Price includes product only, plus any updates published within 30 days of purchase or as otherwise indicated. Subscription options include:

NS/A NON-SERVICE TITLE WITH AUTOMATIC SHIPMENT

If you select this option you will receive and be billed for updates outside of the 30-day period without any action on your part. Estimated upkeep cost or prior-year cost is noted with each title.

NS/N NON-SERVICE TITLE WITH NOTIFICATION

Notification that an update has been published, and the price of the update, will be sent to you. If you fail to act, you will not receive the update.

Cancellation

All eBooks, CDs, downloadable content and software purchases are noncancelable, nonrefundable and nonreturnable. Customers may not cancel a current subscription to eBooks, but may cancel after the end of the current subscription period. CD/DVD pricing is for single user only. Call 800.223.1940 for details, ordering and contract. For complete terms and conditions related to your print subscription, go to [lexisnexis.com/US/terms](https://www.lexisnexis.com/US/terms).

You may cancel any subscription at any time by emailing SubscriptionSpecialist@lexisnexis.com; calling Customer Support at 800.833.9844; or by returning an invoice or notification marked "CANCEL." Shipments may be returned within 30 days of receipt, at your expense, for full credit of the advertised price, less shipping and handling fees and any other discount credits.

If you cancel a Service Title between 31 and 60 days after the invoice date and you return the product at your expense, you will receive a 5/6th credit of the price for the annual subscription. No credit will be given more than 60 days after the invoice date.

If you return a Non-Service Title at your expense within 30 days of shipment, you will receive full credit for the purchase price. No credit will be given for returns more than 30 days after shipment. No credit will be given more than 60 days after the invoice date.

Promotional Terms

Prices listed at the LexisNexis® Store are before shipping and tax are calculated; shipped to a U.S. address. Prices current as of 3/10/2021. Prices subject to change without notice.

*Select titles, including Matthew Bender® Elite products are not discounted when purchased on the LexisNexis® Store, even with an advertised promotion/offer. Additional discounts may be available to customers who subscribe to both online and print products; please call 800.223.1940 for more information and to verify discount qualification, subject to your employer's policies. Any discounting is contingent on maintaining all your subscriptions and accounts with LexisNexis and its affiliates; if any such existing business is canceled by you, LexisNexis may modify such prices to reduce or eliminate any discounts. Sales to federal government customers may be subject to specific contract pricing and not discounted additionally. Booksellers and distributors/resellers are excluded from any discounting. Void where prohibited. Other restrictions may apply, see [lexisnexis.com/US/terms](https://www.lexisnexis.com/US/terms).

†LexisNexis eBooks include links to the Lexis+ and Lexis services for further legal research options. A valid subscription to Lexis or Lexis+ is required to access content.





LexisNexis Matthew Bender
9443 Springboro Pike
Miamisburg, OH 45342

**Estate Planning and Administration,
Trusts and Gifts, and Elder Law**
2021 Catalog of Legal Resources



FOR MORE INFORMATION OR TO ORDER: