[PDF] Best Practices for Structuring Trusts and Estates, 2015 ed.: Leading Lawyers on Drafting a Flexible Plan, Protecting the Client's Assets, and Leveraging Tax Strategies (Inside the Minds)

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James Leese, Heidi Freeman, John Terry, Paul McCawley, Lauren Wolven, Ashley Gray, James Carter, Paula Peaden, Micah Salb, Elizabeth Bawden, Alfred Stashis
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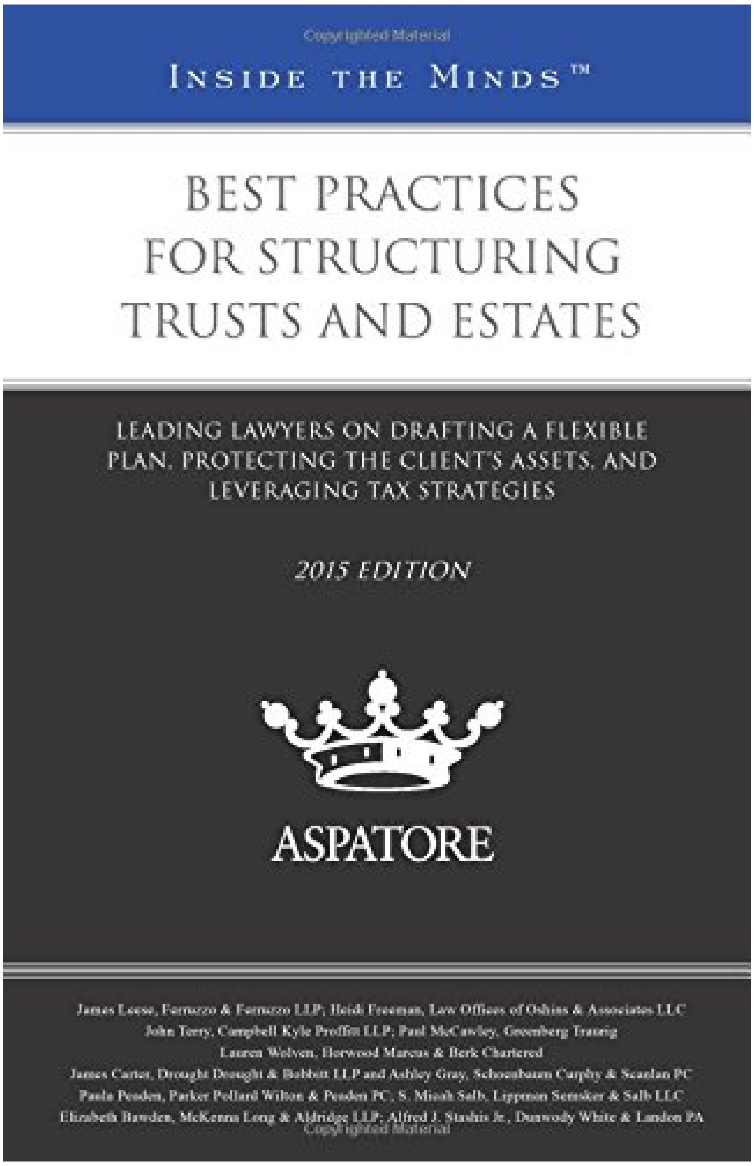

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James Leese, Heidi Freeman, John Terry, Paul McCawley, Lauren Wolven, Ashley Gray, James Carter, Paula Peaden, Micah Salb, Elizabeth Bawden, Alfred Stashis : Best Practices for Structuring Trusts and Estates, 2015 ed.: Leading Lawyers on Drafting a Flexible Plan, Protecting the Client's Assets, and Leveraging Tax Strategies

(Inside the Minds) before purchasing it in order to gage whether or not it would be worth my time, and all praised Best Practices for Structuring Trusts and Estates, 2015 ed.: Leading Lawyers on Drafting a Flexible Plan, Protecting the Client's Assets, and Leveraging Tax Strategies (Inside the Minds):

Best Practices for Structuring Trusts and Estates provides an authoritative, insider's perspective on creating estate plans that incorporate recent legislative changes and client needs. Featuring experienced partners from law firms across the nation, these experts outline the nature of various trusts used by individuals and families and guide the reader through common considerations in applicable tax matters. These top lawyers offer specific advice on naming trustees, understanding the impact of client age on planning, and addressing common concerns, including sibling conflict and special needs protection considerations. From keeping abreast of trends impacting the law to explaining the steps of initial client meetings, these experts identify formative legislation, such as the Defense of Marriage Act (DOMA) and TRA 2010, and examine necessary client information in order to develop flexible trusts and estates. The different niches represented and the breadth of perspectives presented enable readers to get inside some of the great legal minds of today, as these experienced lawyers offer up their thoughts on the keys to success within this rapidly-changing legal field. Inside the Minds provides readers with proven business and legal intelligence from leading C-Level executives and lawyers. Each chapter offers thought leadership and expert analysis on an industry, profession, or topic, providing a future-oriented perspective and proven strategies for success. Each author has been selected based on their experience and C-Level standing within the business and legal communities. Chapters Include: 1. James Leese, Partner, Ferruzzo Ferruzzo LLP - "Best Estate Plans Take Family Dynamics into Consideration" 2. Heidi Freeman, Member, Law Offices of Oshins Associates LLC - "Impacts of TRA 2010 on Trusts and Estates Planning Strategies" 3. John Terry, Partner, Campbell Kyle Proffitt LLP - "Structuring Wills and Trusts" 4. Paul McCawley, Shareholder, Greenberg Traurig - "Customized Approach with an Emphasis on Trust Planning and Structuring Will Result in Effective Estate Plan" 5. Lauren Wolven, Partner, Horwood Marcus Berk Chartered - "Reconnect to the Human Side of the Practice for Successful Estate Planning" 6. James Carter, Partner, Drought Drought Bobbitt LLP, and Ashley Gray, Shareholder, Schoenbaum Curphy Scanlan PC - "Texas Trusts and Estates Law Trends and Issues" 7. Paula Peaden, Shareholder, Parker Pollard Wilton Peaden PC - "Popular Types of Trusts and Considerations for Their Use" 8. S. Micah Salb, Principal Attorney, Lippman Semsker Salb LLC - "Recent Developments in Trusts and Estates Law: Increased Uncertainty, Risk, and Worry and the Power of the Planner to Lessen Those Worries" 9. Elizabeth Bawden, Partner, McKenna Long Aldridge LLP - "Accomplishing Clients' Estate Planning Goals in a Post-ATRA Environment" 10. Alfred J. Stashis Jr., Shareholder, Dunwody White Landon PA - "Drafting for Flexibility while Protecting Assets and Minimizing Taxes" Appendices Include: Appendix A: Lifetime Benefit Trust Alternative Language Appendix B: Checklist of Distributions Options from Lifetime Benefit Trusts Appendix C: Last Will and Testament Sample with Child Support Trust and Minor's Trust Appendix D: ABC Trust Appendix E: Estate Planning Inventory Appendix F: Sample Guidelines for Exercise of Trustee's Discretion Appendix G: Charts Appendix H: Tax Exemption and Trust Planning versus Portability Planning Charts