



Best Practices for Structuring Trusts and Estates, 2016 edition: Leading Lawyers on Drafting a Flexible Plan, Protecting the Client's Assets, and Leveraging Tax Strategies (Inside the Minds)

Caitlyn Sikorski, Nancy Hughes, Domingo Such, James Lee, Steven Jung, Susan Ylitalo

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Flexibility has continuously played a large part in estate planning. With ever-present evolutions in the law, such as ATRA 2012 and the Uniform Trust Code, clients are finding themselves searching for the best ways to protect their assets and leverage tax strategies. In order to best help them understand how this legal field is changing, you also need to know what has happened, and what is predicted for the future. Best Practices for Structuring Trusts and Estates provides you with an authoritative perspective on major obstacles in the industry. Inside this book, you will find proven strategies for creating estate plans that achieve client goals and utilizing trusts in estates that have elected portability. Featuring partners from law firms nationwide, this book also offers you key tips for educating clients on trends in estate planning, including the various types of trusts, such as tax-driven, offshore, and family-driven, and their uses. These top lawyers help you address the roles of attorneys and trustees in estate planning, and outline the effects of utilizing non-judicial settlement agreements. This book gives you best practices for explaining portability in tax plans to clients and identifying opportunities to modify irrevocable trusts. Inside, you will also uncover ways to help clients mitigate litigation risks through settlement agreements, and the ways in which to modify outdated provisions. Helping your clients choose the appropriate trust for their estate plan is a huge part of the job, and the advice within this book can allow you to advise them well.

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. Caitlyn B. Sikorski, Attorney, Reinhart Boerner Van Deuren sc -"Detailed Drafting and Nonjudicial Settlement Agreements: Mitigating Litigation Risk and Adding Flexibility"
2. Nancy C. Hughes, Shareholder, Hughes & Scalise PC -"Creating Estate Plans that Play to the End Game and Achieve Family Goals"
3. Domingo P. Such III, Partner, Perkins Coie LLP -"Best Practices: Leveraging Recent Updates in Federal Tax and State Trust Law to Transfer Wealth and Update Outdated Trust Provisions"
4. T. James Lee, Shareholder, Fennemore Craig PC - "Effective Estate Planning in a Changing Environment, Post-ATRA"
5. Steven A. Jung, Senior Counsel, Brownstein Hyatt Farber Schreck LLP -"Use of Trusts and Planning for Portability in Mid-Sized Estates"
6. Susan W. Ylitalo, Partner, Day Pitney LLP -"Client Concerns: Taxes, Creditor Protection, and Control over Trusts"

Appendices include:

Appendix A: Wisconsin Trust Code: Practice Guide: Nonjudicial Settlement Agreement

Appendix B: Wisconsin Trust Code: Sample Practice Guide: Trust Administration

Appendix C: EXHIBITS A C

Appendix D: State Decanting Summary

Appendix E: Final Portability Regulations

Appendix F: Sample Follow-Up Correspondence Following Creation of ILIT

Appendix G: Pfannenstiehl v. Pfannenstiehl

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From reader reviews:

Gayle Collins:

This book untitled Best Practices for Structuring Trusts and Estates, 2016 edition: Leading Lawyers on Drafting a Flexible Plan, Protecting the Client's Assets, and Leveraging Tax Strategies (Inside the Minds) to be one of several books that best seller in this year, honestly, that is because when you read this publication you can get a lot of benefit onto it. You will easily to buy this book in the book shop or you can order it by using online. The publisher of the book sells the e-book too. It makes you more easily to read this book, as you can read this book in your Touch screen phone. So there is no reason for you to past this book from your list.

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