



**Best Practices for Structuring Trusts and Estates,
2013 ed.: Leading Lawyers on Drafting a Flexible
Plan, Protecting the Client's Assets, and
Leveraging Tax Strategies (Inside the Minds)**

Multiple Authors

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Best Practices for Structuring Trusts and Estates provides an authoritative, insider's perspective on developing effective trusts and estate plans. Featuring experienced partners from law firms across the nation, these experts guide the reader through the process of gathering information about clients and assisting them in creating the most relevant trusts for their needs. These top lawyers offer specific advice on effectively working with clients and educating them on the estate planning process. From matters such as the 2010 Job and Tax Relief Act, to winning the lottery and avoiding probate, these experts discuss issues that have arisen from the tumultuous economic climate, stressing the importance of the lawyer's role in estate planning decisions. 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 ever-present 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. Mary W. Browning, Member, Cole Schotz Meisel Forman & Leonard PA - "Addressing and Understanding Client Goals, Motivations, and Concerns to Create Successful, Individualized Trusts and Estate Plans."
2. Marianna W. Putnam Liddell, Partner, Pierce Atwood LLP - "Estate Planning Today: Practicing Amid the Flux of Tax-Related Planning Issues and the Endurance of Non-Tax Planning Issues."
3. James H. Siegel, Member, Seltzer Caplan McMahon Vitek - "The Importance of Analyzing Family Dynamics to Provide Clients with Appropriate Trust and Estate Plans."
4. Jason M. Kurland, Partner, Certilman Balin Adler & Hyman LLP - "Creating Trusts for Lottery Winners."
5. Dawn Hall Cunneen, Partner, Procopio Cory Hargreaves & Savitch - "The Impact of Changing Trends and Laws on the Estate Planning Process."
6. Blaine Smith, Partner, Bass Berry & Sims PLC - "Adapting to the Tax Uncertainties and Shifting Focus in Trusts and Estates Planning."
7. Thomas M. Sheehan, Partner, Rubin and Rudman LLP - "Estate Planning: Issues to Consider When Developing an Estate Plan."

Appendices include:

Appendix A: Estate Planning Data Sheet

Appendix B: Estate Planning Questionnaire for Married Couple

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