



**Best Practices for Structuring Trusts and Estates,
2010 ed.: Leading Lawyers on Protecting Assets,
Meeting the Needs of Today's Clients, and ...
Federal Estate Tax Issues (Inside the Minds)**

Multiple Authors

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Best Practices for Structuring Trusts and Estates provides an authoritative, insider's perspective on key strategies for structuring trusts and developing estate plans to meet client needs. Featuring partners from law firms across the nation, these experts guide the reader through the different phases of the estate planning process and the key considerations for each phase. These top lawyers reveal their advice for understanding the unique concerns facing today's clients, as they discuss how best to manage estate planning when there is uncertainty about the federal estate tax, continuous changes in family dynamics, and an increasing number of clients who travel frequently or are non-citizens. From evaluating structures for a new trust to modifying an existing trust, these authors stress the importance of structuring a trust to meet specific client goals. Additionally, these leaders comment on ways to mitigate the threat of online estate planning options available to clients. 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 around the keys to navigating this ever-evolving area of law.

Inside the Minds provides readers with proven business intelligence from C-Level executives and lawyers (Chairman, CEO, CFO, CMO, Partner) from the world's most respected companies and firms nationwide. Each chapter is comparable to an essay/thought leadership piece and is a future-oriented look at where an industry, profession, or topic is heading and the most important issues for the future. Each author has been selected based upon their experience and C-level standing within the professional community.

Chapters Include:

1. Anthony R. Perrelli, Partner, Hedeker & Perrelli Ltd. - "Balancing the Needs and Expectations of a Multi-Generational Client Base"
2. Daniel S. Rubin, Partner, Moses & Singer LLP - "Changing Techniques for Protecting Client Assets in Their Trusts and Estates Plans"
3. Woods King III, Shareholder, Buckley King LPA - "The 2010 Trust Landscape"
4. Kimberly Quarles Swintosky, Partner, Smith, Anderson, Blount, Dorsett, Mitchell & Jernigan LLP - "Strategies for Addressing the Challenges Faced by Trusts and Estates Clients in a Time of Transition"
5. Bryon W. Harmon, Partner, Shipman & Goodwin LLP - "Estate Planning in Uncertain Times"
6. Kristin T. Abati, Partner, Choate, Hall & Stewart LLP - "Planning with Family Limited Partnerships and Other New Developments"
7. Marilyn W. McWilliams, Partner, Moye White LLP - "Avoiding Estate and Trust Litigation: Top Issues for Estate Planners and Their Clients in 2010"

Appendices Include:

Appendix A: Married Client Asset Information

Appendix B: Single Client Asset Information
Appendix C: Living Trust Consultation
Appendix D: Trust Questionnaire and Document Checklist
Appendix E: Estate Planning Questionnaire
Appendix F: Will Provisions
Appendix G: Estate Planning Checklist
Appendix H: Summary of Net Assets
Appendix I: List of Community Property States
Appendix J: Residue Clause
Appendix K: Estate Planning Checklist II

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