



**Estate Planning Client Strategies, 2011 ed:
Leading Lawyers on Creating Flexible Estate
Plans, Developing Trusts, and Meeting Client
Expectations (Inside the Minds)**

Multiple Authors

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Estate Planning Client Strategies provides an authoritative, insider's perspective on key tips for developing estate plans to best meet client needs. Featuring experienced partners from law firms across the nation, these experts guide the reader through some of the common challenges facing trusts and estates lawyers in today's legal climate. These top lawyers offer advice on creating business succession plans, utilizing trusts to protect client assets, and navigating the uncertainty surrounding the federal estate tax. From shifting family dynamics to recent developments in the law, these experts reveal proven strategies for drafting estate plans that are flexible enough to provide for the possibility of unanticipated changes in the future. Additionally, these leaders discuss issues that commonly arise in probate and comment on how probate can be a useful device to resolve various legal issues. 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-evolving area of law.

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. Michael D. Sontag, Partner, Bass, Berry & Sims PLC - "Developing Clients' Estate Plans in 2011 and Beyond"
2. Julie Ann Garber, Attorney, Becker & Poliakoff PA - "Estate Planning Strategies for Today's Clients"
3. Paul Walter and Louis Jay Ulman, Partners, Offit Kurman - "New Estate Planning Developments for Attorneys and Their Clients"
4. Carl E. Eastwick, Counsel, Semmes, Bowen & Semmes - "Preserving Assets and Solving Problems for Estate Planning Clients in 2011"
5. James P. Seguin, Partner, Buckley King - "Overcoming New and Old Challenges in the Estate Planning Process"

Appendices Include:

Appendix A: Client Info Sheet

Appendix B: Sample Investment Policy Statement for Trustees (Prudent Person Standard)

Appendix C: Estate Plan Personal Data Sheet for Married Couples

Appendix D: Estate Planning Checklist

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