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of Live 2.5-Hour August 28, 2006 Presentation

**STEVEN G. SIEGEL**

# THE DYNASTY TRUST: CREATING THE GIFT THAT WILL KEEP ON GIVING

## OUTSTANDING!

*“Excellent explanation. Very useful trust form. I really appreciate the practical coverage of GST and S Corp.”*

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This **2.5-hour August 28, 2006** presentation gives you a practical and useful explanation of dynasty trusts, one of the “hottest” current estate planning topics! **Important new developments** are covered, including **new strategies** with the **higher GST exemption**, more states **abolished** the **Rule Against Perpetuities**, **liberalized S Corp. rules**, use of new **“cascading” Crummey** powers and more.

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**STEVEN G. SIEGEL** is president of The Siegel Group, Morristown, New Jersey, a national consulting firm providing tax and estate planning advice to individuals and businesses. Mr. Siegel holds a BS from Georgetown University, a JD from Harvard Law School and an LLM in Taxation from New York University. He is the author of several books, including *The Estate Planning Course Book*. Mr. Siegel is a nationally-recognized writer and speaker who has lectured extensively throughout the United States on tax, business and estate planning topics.

## TOPICS

- ✓ What Is It?
  - the elements and goals
  - GST and state tax considerations
  - when to create
- ✓ The Dynasty Trust And The GST Tax
- ✓ Funding The Dynasty Trust
  - savings examples
  - leveraging; discounts
- ✓ How Long May The Dynasty Trust Last?
- ✓ Planning And Drafting The Dynasty Trust
  - beneficiary, trustee and administrative clauses
  - funding and uses
  - new S Corp. and ESBT rules
  - “cascading” Crummey
  - combining with defective trusts
- ✓ Ending The Trust
- ✓ State Taxation
- ✓ More



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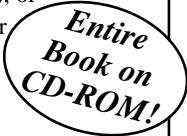
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  - Dynasty Trusts And The Rules Against Perpetuities
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