

31-Page Course Book, Audio CDs, and DVD of  
Live 2.5-Hour April 26, 2010 Presentation  
**STEVEN G. SIEGEL**



# CRITICAL ESTATE PLANNING DECISIONS: 2010, 2011 AND BEYOND

## Why YOU Should Purchase

In this April 26, 2010 2.5-hour presentation, Steven G. Siegel, a leading nationally-recognized tax and estate planning adviser, provides a **comprehensive** and **useful explanation** of what estate planners should be considering for **planning** and **drafting** in view of the current uncertainty of the Federal wealth transfer tax laws in 2010, 2011 and thereafter.

This detailed “**how-to**” practitioner-oriented program gives you the **knowledge you need** to properly advise your clients.

Download **23 CLAUSES FOR  
2010 ESTATE TAX ISSUES** at  
[www.NLFforms.com](http://www.NLFforms.com)

## COMPLETE TABLE OF CONTENTS

To see the complete **Table of Contents** for this course book, or that of any other Estates, Gifts, Trusts or Tax topic we offer, go to [www.nlfcle.com](http://www.nlfcle.com) and click on the **Estates, Gifts, Trusts & Tax Materials** link on the home page. Click on the blue **Table of Contents** link under the title of the topic you wish to review. To return to the **Estate, Gifts, Trusts and Tax Materials** main page, click the “Back” key on your browser.

**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



- ✓ **2010 Planning**
  - the current law in 2010
  - what will be the law in 2011?
  - what are the possible 2010 outcomes that will affect tax planning?
  - concerns in 2010 with Will and Trust formula clauses
  - 2010 planning to address formulas, spouses and children
  - 2010 planning if there is no GST tax
  - planning for carryover basis, for gifting issues and for states with independent death taxes
- ✓ **Planning Checklist If Repeal Stands**
- ✓ **Planning For A Reinstated Federal Estate Tax**
- ✓ **Planning Techniques To Reduce The Size Of An Estate**
- ✓ **Proposed Changes In The Law**
- ✓ **Health Care Reform Law Enacted: Effect On Tax And Estate Planning**

➔ **ORDER YOUR 31-PAGE COURSE BOOK, AUDIO CDs or DVD TODAY!** ←

## **IN A HURRY?**

Place your order **TODAY** with  
VISA, Discover, MasterCard or American Express  
by **calling 302/656-4757**, by **faxing 302/655-6363**  
**OR** by visiting our Web site, [www.nlfcle.com](http://www.nlfcle.com)



**31-Page Course Book:** Each audio CD and DVD order comes with a **FREE** course book. Alternatively, you may order **just the course book**. Spiral-bound for convenient use, it is **31 pages long** and **loaded with Mr. Siegel's valuable tips, ideas and warnings**.

**2.5-Hour Audio CDs/DVD:** These recordings of the entire program can be used at home or office. Audio CDs are **great for studying while traveling**. The DVDs are in color and **perfect for group or individual viewing**.

**Recordings of Live Program:** The audio CDs and DVD are the unedited recordings of the full 2.5-hour presentation by Mr. Siegel on **April 26, 2010**.

**CLE Credits for In-House or Self-Study:** National Law Foundation is an accredited CLE provider in **California, Florida, Illinois, New Jersey, Ohio, Oregon, Pennsylvania, Washington** and many other states. Purchase the DVD or CDs from this excellent program and **earn CLE Credits by Self-Study**. (Check with your CLE Commission or visit our Web site, [www.nlfcle.com](http://www.nlfcle.com).)

**This course does not qualify for New York CLE Credit.**

## Valuable Book!

**At least** purchase the outstanding, comprehensive course book Mr. Siegel has prepared:



✓ **31 Pages**

✓ **Major Headings Are:**

- 2010 Planning: The Unthinkable Happened
  - Assuming No Changes, What Is The Law in 2010?
  - Assuming No Changes, What Will The Law Be in 2011?
- What Are the Possible Outcomes in 2010 That Will Affect Tax Planning?
- Planning Checklist If Repeal Stands
- Planning For A Reinstated Federal Estate Tax
- Planning Techniques To Reduce The Size Of An Estate
  - Beyond Basic Gifting
  - Planning in The "Perfect Storm"
- Proposed Changes In The Law
- The Treasury "Green Book" of Estate and Gift Tax Proposals
- Other Legislative Proposals
- New Laws Enacted As Part Of The Health Care Reform – Effect On Future Tax And Estate Planning

Download **23 CLAUSES FOR  
2010 ESTATE TAX ISSUES** at  
[www.NLFforms.com](http://www.NLFforms.com)

### ORDER FORM — 4 EASY WAYS TO ORDER:

1. Place your order on our Web site, [www.nlfcle.com](http://www.nlfcle.com), with credit card charge (**VISA, MasterCard or American Express ONLY**), or
2. Complete and **mail brochure** with check or credit card to **National Law Foundation, P. O. Box 218, Montchanin, DE 19710**, or
3. **Telephone 302/656-4757** with credit card charge (**VISA, Discover, MasterCard or American Express**), or
4. **FAX this side of the brochure** with credit card charge (**VISA, Discover, MasterCard or American Express**), to **302/655-6363**

NAME OF ATTORNEY \_\_\_\_\_ TELEPHONE (day) \_\_\_\_\_

FIRM NAME \_\_\_\_\_ FAX \_\_\_\_\_

ADDRESS \_\_\_\_\_

CITY \_\_\_\_\_ STATE \_\_\_\_\_ ZIP \_\_\_\_\_ (If purchasing for CLE, what state? \_\_\_\_\_)

Enclosed is my check to NATIONAL LAW FOUNDATION     Charge my credit card (**VISA, Discover, MasterCard or AmEx**)

CREDIT CARD INFORMATION: Name on Card \_\_\_\_\_ Card No. \_\_\_\_\_

Exp. Date \_\_\_\_\_ Billing House or PO Box # \_\_\_\_\_ Billing Zip Code \_\_\_\_\_ Security Code (3 or 4 digit number) \_\_\_\_\_

**Price includes UPS Ground shipping.** For shipping via **expedited Federal Express** at additional charge, circle below.

**CIRCLE: overnight or 2nd day CHARGE Federal Express # \_\_\_\_\_  or my credit card.**

**E-MAIL NOTICE:** To receive update notifications of our seminars and self-study topics by e-mail, provide your e-mail address here:

\_\_\_\_\_ (All customer information, including your e-mail address, is kept in *strict confidence*)

## CRITICAL ESTATE PLANNING DECISIONS: 2010, 2011, BEYOND

• April 26, 2010 • 2.5 Hours •

(355)

**This course is accredited for CLE credit in these states (and many others) when CDs/DVDs + Course Book are purchased:**

- AZ - 2.5 GEN    • FL - 3 GEN    • MT - 2.5 GEN    • OR - 2.5 GEN
- CA - 2.5 GEN    • IL - 2.5 GEN    • NJ - 3 GEN    • PA - 2.5 GEN
- CO - 3 GEN    • MO - 3 GEN    • OH - 2.5 GEN    • WA - 2.5 GEN

Visit our Web site, [www.nlfcle.com](http://www.nlfcle.com), for information on CLE requirements in these and other states and a full list of other courses available for CLE credit

2.5-hour DVD and 31-Page Course Book    **\*\$129**

2.5-hour Audio CDs and 31-Page Course Book    **\*\$109**

31-Page Course Book **ONLY**    **\$39**

**\*May be used to earn Self-Study CLE credit. See box at left for details.**

**Audiotapes and VHS tapes available by special order only – Call 302-656-4757**