



2012 AND BEYOND: ESTATE AND TAX PLANNING INCLUDING PORTABILITY

Why YOU Should Purchase

Think of 2012 as the “Year of Planning Opportunities,” hopefully not the end of the “Golden Age” for estate planning. In this 2.5-hour, January 6, 2012 program by Steven G. Siegel, a nationally-recognized tax and estate planning expert, you receive a useful explanation of the Federal Estate, Gift and Generation-Skipping Tax Rules for 2012 and beyond, including the very important “portability” of the Federal Estate Tax Exemption. Mr. Siegel then gives a practical description of the potential problems to avoid and the opportunities to consider.

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

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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 Are The Estate, Gift And Generation-Skipping Tax Rules For 2012 And Beyond?
- ✓ Portability of The Estate Tax Exemption
- ✓ Potential Problem With Formula Clauses In Wills And Trusts
- ✓ Planning Opportunities In 2012
- ✓ Flexible Planning Is Essential
- ✓ Be Certain Life Insurance Is Not Taxable In Decedent’s Estate
- ✓ Maximize Gifting In 2012
- ✓ Freeze Values At Current Levels
- ✓ Consider Dynasty Trusts
- ✓ Relevant New Laws Enacted As Part Of The Health Care Reform: Effect On Future Tax And Estate Planning

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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 DVD is 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 **January 6, 2012**.

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Valuable Book!

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

- ✓ 33 Pages
- ✓ Major Headings Are:
 - Introduction
 - What Are The Estate Tax Rules For 2012 And Beyond?
 - What Are The Gift Tax Rules For 2012 And Beyond?
 - What Are The Generation-Skipping Transfer Tax Rules For 2012 And Beyond?
 - Portability of The Estate Tax Exemption
 - Make Sure the Clients Understand the Plan They Have
 - General Planning Opportunities Suggested by the 2010 Tax Relief Act
 - Flexible Planning Is Essential for 2012 and Beyond
 - Make Certain that Life Insurance is not a Taxable Asset in a Decedent's Estate
 - Maximize Gifting Opportunities in 2012
 - Freeze Values at Current Levels for Senior Generation Clients
 - Multi-Generation-Skipping Transfer Tax Planning: Using Dynasty Trusts
 - New Laws Enacted As Part Of The Health Care Reform: Effect On Future Tax And Estate Planning



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• January 6, 2012 • 2.5 Hours •

(393)

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