



**STEVEN G. SIEGEL**

# INTRODUCTION TO ESTATE PLANNING

## Why YOU Should Purchase

In this December 10, 2014, 2.5 hour presentation, Steven G. Siegel gives a practical introduction to estate planning. This program is geared for those attorneys who are not yet experts in this area of practice. Mr. Siegel is a nationally-recognized tax and estate planning adviser, author and speaker.

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## TOPICS



- ✓ Why Estate Planning?
- ✓ Getting Started: The Questionnaire And Interview
- ✓ Elements Contained (Or To Be Considered) In Every Will
- ✓ Using Trusts In Estate Planning
- ✓ How Does The Federal Estate Tax System Work?
- ✓ Addressing The Types Of Property Interests Likely To Be Owned By A Client
- ✓ Basic Tax Issues To Consider In Developing An Estate Plan
- ✓ Elementary Documents To Address With Every Client

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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.

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  - **Getting Started: The Questionnaire and Interview**
  - **Elements Contained in (or To Be Considered in) Every Will**
  - **Using Trusts in Estate Planning**
  - **How Does the Federal Estate Tax System Work?**
  - **Addressing the Types of Property Interests Likely to be Owned by a Client**
    - Part I: Handling Jointly-Held Property
    - Part II: Handling Life Insurance Policies
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  - **Basic Tax Issues To Consider in Developing an Estate Plan**
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