

80/20 Estate Planning  
Host – Albert E. Gibbons

Tape # 12

***Guests:***

David M. Frees, III, Esq. – Unruh, Turner, Burke & Frees, P.C.  
Edwin R. Boynton, Esq., Partner – Stradley, Ronon, Stevens & Young, LLP

***Topic:***

**Sophisticated Trust Strategies**

***Outline:***

How do you simplify the goals and tools of a trust?

What besides tax savings can a trust accomplish?

What are the responsibilities of a trustee?

Can a trustee ever be changed on an ongoing basis?

What is a Generation Skipping Trust?

What are the tax consequences of a Generation Skipping Trust?

What are the rules and regulations of a Generation Skipping Trust?

How does an Individual go about selecting his advisors for these extremely complex strategies?

How important is the accounting that goes into the establishment of these complex trust strategies?

What is a Dynasty Trust?

What is the significance of which state these trusts established?

What are the positives & negatives of a trust going on forever?

What are beneficiary controlled trusts?