

80/20 Estate Planning  
Host – Albert E. Gibbons

Tape #2

***Guests:***

Brent Lipshultz – KPMG Peat Marwick, LLP  
Lawrence S. Chane, Esq. – Blank, Rome, Comisky & McCauley, LLP

***Topic:***

**“The Estate Planning Team”**

***Outline:***

Who is essential to the team?

How will all the members of the team get on the same page?

How do you pick the members of the team?

Does the size and the complexity of the estate influence who becomes part of the team?

What credentials are important for the team members?

Who will steer the client through the Estate Planning process?

Who is responsible for managing the clients expectations?