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2010 Tax Act and Videos

By Richard M. Morgan & Loraine M. DiSalvo

For this edition of our monthly Newsletter, the Passionate Estate Planner, we are going to try something different.

Richard recently gave a speech at the 2011 Fiduciary Law Institute on important planning under the temporary 2010 Tax Act. While this speech was given primarily to other estate planning attorneys at this prestigious Georgia Institute, we felt that our friends may like to see the video clips as they address some of the topics addressed in our recent newsletters, including:

1. While it is too late to undertake any 2010 transactions, our clients who made transfers in 2010 or whose family members passed away in 2010 may have steps to take to deal with or maximize their benefit under the 2010 Tax Act. Watch this video on Completed 2010 Gifting Issues.

2. Huge planning opportunities exist related to the increase in the gift tax exemption to $5 million until the end of 2012. This is a window of opportunity that should at least be considered and not ignored. Watch these videos on:

   - Exemption/Rate & Gifting Benefits
   - Types of Gifts to Make
   - Caveats to Gifting
   - Financial Insecurity – the Elephant in the Room

These videos cover the issues for those that already made gift transfers during 2010. For individuals considering making significant gifts prior to the end of 2012, these videos include the pros and cons and dealing with the biggest issue: possible financial insecurity concerns to making these type gifts.

We hope that you find them helpful and as always will feel comfortable contacting us with your questions and concerns. Enjoy the videos.

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