SpencerFane®

Samuel DiPietro Leads BDIT Presentation for State Bar of Arizona CLE

Spencer Fane attorney Samuel DiPietro presented during the State Bar of Arizona's Advanced Estate Planning CLE on March 12 in Phoenix.

This hybrid event included four hours of programming on the following topics including charitable gift trusts and important planning considerations for this year. Sam's presentation – Beneficiary Defective Whats?! – provided a high-level overview on the nuts and bolts of beneficiary defective irrevocable trusts (BDITs).

BDITs allow a beneficiary to form and protect assets if estate planning professionals understand the circumstances under which they are best used. Samuel outlined the mechanics, benefits, and risks of BDITS as an estate planning tool in a Spencer Fane blog post, and he continues to present on the topic.

At the firm, Samuel collaborates with families and their advisers to create customized estate plans that consider the specific needs of each family, ensuring the protection and seamless transfer of wealth. He has extensive experience crafting estate plans tailored to the unique requirements of modern families, experience he also frequently employs to serve as an industry thought leader.