SpencerFane®

Samuel DiPietro Provides Guidance on Spousal Lifetime Access Trusts for Estate Planning CLE

Spencer Fane attorney Samuel DiPietro will serve on an August 20 virtual panel for a Strafford CLE focused on spousal lifetime access trusts (SLATs).

The webinar – SLATS: Income, Gift, Estate, and GST Tax; State Limitations; Building in Powers and Options – will educate trusts and estates counsel about the benefit of SLATs as an estate planning tool, especially in light of current and ever-changing tax law, such as the impending sunset of the current estate tax exemption. Samuel and his fellow panelists will also explore critical issues and related pitfalls concerning income, gift, estate, and GST taxes and review the best way to minimize tax liability while ensuring multigenerational gifting and flexible long-term planning.

At Spencer Fane, Samuel collaborates with families and their advisors 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.