



## Augusta Estate Planning Council

Post Office Box 1477  
Augusta, Georgia 30903

October, 2021

**SAVE THE DATE! Friday, November 5<sup>th</sup> 7:30 a.m. – 12:00 noon**

We are just a matter of weeks away from hosting another half-day continuing education seminar. The Council is pleased to bring this year's seminar to the CSRA in person once again. We have a speaker more than worthy of the momentous occasion of our return to in person meetings – **Steve Siegel, JD, LL.M.**

*Steven Siegel is president of The Siegel Group, which provides consulting services to attorneys, accountants, business owners, family offices and financial planners. Based in Morristown, New Jersey, the Group provides services throughout the United States.*

*Mr. Siegel is the author of many books, including: The Grantor Trust Answer Book (2018 CCH); The Adviser's Guide to Financial and Estate Planning (AICPA 2020); Federal Fiduciary Income Taxation (Foxmoor 2019); Federal Estate and Gift Tax (Foxmoor 2016)). He is co-author of Income Taxation of Trusts and Estates, (Carolina Press 2020). He is the co-author with Richard Oshins, Esq. of The Anatomy of the Perfect Modern Trust, Estate Planning Magazine, January and February 2016.*

*In conjunction with numerous tax planning lectures he has delivered for the National Law Foundation, Mr. Siegel has prepared extensive lecture materials on the following subjects: Planning for An Aging Population; Business Entities: Start to Finish; Preparing the Audit-Proof Federal Estate Tax Return; Business Acquisitions: Representing Buyers and Sellers in the Sale of a Business; Dynasty Trusts; Planning with Intentionally-Defective Grantor Trusts, Introduction to Estate Planning; Intermediate-Sized Estate Planning; Social Security, Medicare and Medicaid: Explanation and Planning Strategies; Subchapter S Corporations: Using Trusts as Shareholders; Divorce and Separation: Important Tax Planning Issues; The Portability Election; and many other titles.*

For those of you who have attended a lecture by Steve, you will no doubt be looking forward to his presentation. If you have not had the chance to attend one of Steve's presentations, it truly is a must to be there on **November 5<sup>th</sup>**! Please share this with others in your firm or circle of professional contacts. We would love to have as many guests as possible for this.

For the Council,

*Troy Breitmann*

President