

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.

Mr. Siegel has delivered hundreds of lectures to thousands of attendees in live venues and via webinars throughout the United States on tax, business and estate planning topics on behalf of numerous organizations, including The Heckerling Institute on Tax Planning, Notre Dame Tax and Estate Planning Institute, CCH, National Law Foundation, AICPA, The Kansas City Estate Planning Symposium, Yale School of Management; U. of Chicago Business School, Western CPE, the National Society of Accountants, Cohn-Reznick, Foxmoor Education, many State Accounting Societies and Estate Planning Councils (including: The California CPA Society, The Southern Nevada Estate Planning Council; the Oregon CPA Society; the Southern Arizona Estate Planning Council; the Georgia CPA Society) as well as on behalf of many private companies.

He is presently serving as an adjunct professor of law in the Graduate Tax Program (LLM) of the University of Alabama (teaching *Income Taxation of Trusts and Estates*), and has served as an adjunct professor of law at Seton Hall and Rutgers University law schools.

Mr. Siegel holds a bachelor's degree from Georgetown University (magna cum laude, phi beta kappa), a juris doctor from Harvard Law School and an LLM in Taxation from New York University Law School.