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LIVESTREAM 09/30/25 | ON DEMAND 10/21/25

Experts in Estate Planning

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Income and Transfer Tax Planning



Speaker

Samuel A. Donaldson
Georgia State University College of Law
Atlanta, GA

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Expert Advice on Tax Planning

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PROBATE & ESTATE PLANNING
CERTIFICATE PROGRAM ELECTIVE

Join Samuel A. Donaldson, distinguished professor of law, for a strategic discussion on estate and tax planning. Get tailored templates for small, medium, and large estates to use with your clients. An academic fellow of the American College of Trust and Estate Counsel, Professor Donaldson provides a dynamic recap of the past year's crucial cases, rulings, and regulations in federal income, estate, and gift tax laws, along with vital insights into recent shifts affecting married couples.

You will be able to:

- Take away templates for estates of all sizes
- Effectively form QTIP trusts
- Explore methods to terminate credit shelter and marital trusts
- Minimize or eliminate estate taxes with SLATS
- Grasp tax law changes, including income, estate, and gift taxes



Samuel A. Donaldson

Georgia State University College of Law, *Atlanta, GA*

Samuel coauthored the West casebook “Federal Income Tax: A Contemporary Approach” and the CCH treatise “Price on Contemporary Estate Planning.” During 13 years at the University of Washington School of Law, he earned the Philip A.

Trautman Professor of the Year award five times. He’s an Academic Fellow of the American College of Trust and Estate Counsel.

CLE: 2.75 | MCJE: 2.75 | Level: Intermediate/Advanced

Schedule for Livestream

- 9:00am** Til Death and Taxes Do Us Part: Income and Transfer Tax Planning for Married Couples—Part 1
Estate planning templates for couples with small, medium, and large estates.
- 10:10am** Til Death and Taxes Do Us Part: Income and Transfer Tax Planning for Married Couples—Part 2
Spousal lifetimes access trusts (SLATS); formation and termination of QTIP trusts; intra-spousal transfers; methods for terminating both credit shelter trusts and marital trusts; other planning ideas.
- 11:00am** Break
- 11:15am** Federal Tax Update
A recap of the most important cases, rulings, and other recent developments in federal income, estate, and gift taxes. Plus, a discussion of legislation expected to take effect in 2026.

Past attendees rave about Professor Donaldson’s presentations:

“Great presenter. Very dynamic and very informative.”

“One of the best presenters I have ever heard.”

“Pleasure to listen to.”

“Awesome enthusiasm, great attitude.”