

“You Have Been Appointed As Successor Trustee- Now What?” and Protecting Yourself Online

Saturday, April 15, 2017

Radisson Newport Beach

4545 MacArthur Blvd., Newport Beach, CA 92660

9:30 am-10:00 am: Complimentary Breakfast

10:00 am-11:30 am: Educational Seminar

Most of my clients have heard me speak or have read my 50-page booklet discussing the advantages of properly planning your estate through different types of trusts. *On Saturday, April 15, 2017*, it will be your opportunity to educate your children (or whomever you have appointed as your Successor Trustee) on their duties as Successor Trustee of your trust.

Some of the topics covered will be:

- What are my duties as a Successor Trustee after Mom and Dad have died?
- What is the difference between the Executor and the Successor Trustee?
- How do I handle those assets that never get into the trust?
- How do I preserve the low property tax basis (Prop 13) for the children?
- What is reasonable compensation for my Successor Trustee?
- How to avoid predators and creditors
- How to avoid the in-laws that may become the "outlaws"
- How to keep *the* money in *the* family for generation after generation
- How to eliminate the *voluntary* 40% death tax at your parents' passing
- How to avoid the Terri Schiavo problem
- The hazards of inheriting IRAs and the 50% penalty tax
- Why is it always wrong to leave assets to children outright, and free of trust?

Michael A. Hellbusch, an associate with Tredway Lumsdaine & Doyle LLP, will assist me with this presentation. Cyber threats are everywhere. Protecting yourself online is critical for your financial privacy when using the internet. I sincerely hope you and your Successor Trustee(s) will join us for this enjoyable and beneficial educational breakfast seminar.

Please RSVP **no later than April 7, 2017** to Mary Nuguid at mnuguid@tldlaw.com or at 949-756-0684.

There is limited seating available. Do Not Miss This Important Event!



Very Truly Yours,
TREDWAY, LUMSDAINE & DOYLE, LLP

A handwritten signature in black ink, appearing to read "W. Bailey Smith".

W. Bailey Smith