



# **Strategies for Trusts and Estates in Florida, 2015 ed.: Leading Lawyers on Analyzing Recent Developments and Navigating the Estate Planning Process in Florida (Inside the Minds)**

*Bradley Trushin, Nicholas Bruce, Marian Ancheta Llera, Julia Frey, Daniel Bean, Sarah Butters*

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For even the most seasoned practitioner, effectively navigating the overwhelming nature of the Internal Revenue Code and the underlying nuance Florida's Probate and Trust Code has always presented special challenges. Today, with so much at stake, providing a steady rudder requires greater know-how than ever before. Now, with *Strategies for Trusts and Estates in Florida*, you have the advantage. Inside this book, some of the state's leading law practitioners:

Discuss the most important aspect of an estate planner's job: to define, quantify, and articulate the client's goals in a "smooth" plan that withstands heavy scrutiny;

Demonstrate the ongoing need for estate planning and review specific issues regarding portability, income tax effects on estate planning, and myriad Florida-specific issues

Review the reporting requirements for non-US residents, including all interest, dividends, wages, compensation for services, royalty and rental income, from within and outside the US; and

Examines the role of litigation the "when all else fails" remedy because it's expensive, complicated, time consuming, emotionally taxing, and inherently unpredictable.

This edition has been updated to reflect the latest thinking in Florida estate planning and shines a light on estate planning trends that every practitioner must be aware of.

*Inside the Minds* provides readers with proven business and legal intelligence from leading C-Level executives and lawyers. Each chapter offers thought leadership and expert analysis on an industry, profession, or topic, providing a future-oriented perspective and proven strategies for success. Each author has been selected based on their experience and C-Level standing within the business and legal communities.

### Chapters Include:

1. Bradley H. Trushin, Chepenik Trushin LLP - "Estate and Trust Litigation: Key Issues for Florida Estate Planners"
2. Nicholas L. Bruce, Collins Brown Barkett Garavaglia & Lawn - "Designing the 'Smooth' Estate Plan and Avoiding Litigation"
3. Marian Ancheta Llera, Marian Ancheta Llera PA - "Best Practices for International Tax, Trusts, and Estates"
4. Julia L. Frey, Lowndes Drosdick Doster Kantor & Reed PA - "Estate Planning's Ever-Changing Landscape: Not a Dead Art"
5. Daniel K. Bean and Sarah Butters, Holland & Knight LLP - "Trusts and Estates Litigation"

### Appendices

Appendix A: Memorandum: The Effects of Alcoholism on Testamentary Capacity

Appendix B: Proposed Claim Jury Instruction No. 1: Tortious Interference with an Expected Inheritance

Appendix C: Order Denying Petition for Revocation of Probate of Will and Trust

Appendix D: Information Form

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