

OFTEN OVERLOOKED ESTATE PLANNING ISSUES

BY

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- I. Overuse/Underuse of Credit Shelter Trusts (“CSTs”) vs Portability**
- II. Reciprocal Trust Doctrine**
- III. Charitable Planning**
- IV. Drafting Discretionary Clauses**
- V. Drafting Powers of Appointment**
- VI. Appointing Personal Representatives, Including Those Related to a Deceased Spouse**
- VII. Failure to Plan for the Elective Share**
- VIII. Homestead Planning Issues**
- IX. Drafting Deeds**
- X. Unlicensed Practice of Law**
- XI. Bonus – Reflexive Use of 529 Plans**