



## Trusts & Estates Spring Meeting 2018

**Presented by the New York State Bar Association**

May 3–6, 2018

Joshua Rubenstein, national head of the firm's Private Wealth practice, will present "Pressing the Do Over Button: A Practitioners Perspective on Strategies for Modifying Wills and Trusts After Formation" at 11:00 a.m. (ET) on Saturday, May 5. The session will examine, during these times where everything changes in unanticipated ways, what after-the-fact options there are both to fix mistakes and to change things that weren't mistakes when done but no longer work. These include:

- flexible strategies such as tax and state law elections;
- 9100 relief and private letter rulings;
- construction proceedings;
- qualified and nonqualified disclaimers;
- amendments and decantings; and
- creative exercises of powers of appointment.

---

### CONTACTS

For more information, contact your Katten attorney or any of the following attorneys.



**Joshua S. Rubenstein**

+1.212.940.7150

[joshua.rubenstein@katten.com](mailto:joshua.rubenstein@katten.com)

Attorney advertising. Published as a source of information only. The material contained herein is not to be construed as legal advice or opinion.

©2025 Katten Muchin Rosenman LLP.

All rights reserved. Katten refers to Katten Muchin Rosenman LLP and the affiliated partnership as explained at [katten.com/disclaimer](https://katten.com/disclaimer).