

54th Annual Estate Planning Institute

Presented by the Practising Law Institute (PLI)

September 11–12, 2023

Joshua Rubenstein, national chair of the firm's Private Wealth practice, will present "Pressing the Do-Over Button: Strategies for Modifying Wills and Trusts After Formation" at 10:15 a.m. on Monday, September 11. The session will first discuss how taxes relate to modification, then consider opportunities for modification that have retroactive effect to date of creation, as well as those options whose effect is purely prospective. The session will:

- Consider federal and state tax implications underlying decisions whether, and if so, how to modify wills and trusts after formation
- Review options for modifications that have retroactive effect to date of creation
- Compare options for modifications with only prospective effectiveness
- Consider the availability of litigation settlements to make otherwise much needed modifications to wills and trusts

[Learn more about the 54th Annual Estate Planning Institute.](#)

CONTACTS

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



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