N. Todd Angkatavanich

Partner

Publications and Speaking Engagements

- Presentation on "International Aspects of Estate Planning," New Haven, CT, December 2010.
- Presentation on "Vertical" and "Non-Vertical" Fund Carried Interest Planning, Greenwich, CT and New York, NY, December 2010.
- Presentations on "Year-End and Other Timely Wealth and Tax Planning Ideas," Greenwich, CT and New York, NY, December 2010.
- Presentation on "Business Succession Planning," New York, NY, December 2010.
- "Going Non-Vertical with Fund Interests - Creative Carried Interest Transfer Planning When The "Vertical Slice" Won't "Cut It," *Trusts and Estates Magazine*, November 2010.
- Presentation on "'Carrying' Wealth to the Next Generation - Estate Planning with Carried Interests in Private Equity, Real Estate and Hedge Funds," New York, NY October 2010.
- Presentation on "Year-End Estate Planning Ideas," December 2010.
- Presentation on "Business Succession Planning with Buy-Sell Agreements," Janny Montgomery Scott Planning for Today program, Orange, CT, June 2010.
- "Creative Planning with Preferred Partnerships - The Next Best Thing in Wealth Transfer Planning?" Investment Management Institute, Wealthy Family/Family Office Forum, Greenwich, CT, June 2010.
- "Black Shirts (Black, Shurtz) and the Marital Deduction Mis-match," *Trusts and Estates Magazine*, June 2010.
- Presentation on "Planning with Preferred Partnership" at Estate Planners Day 2010, for Estate Planning Council of New York CIty, Inc., May 2010.
- "Pre-Liquidity Planning - Do It Now," *Trusts and Estates Magazine*, April 2010.
- Presentation on "Trends in Family Offices - Multi-Generational Wealth Planning," for Ivy Plus, Ivy Plus Alternative Investment Network, New York, NY, March 2010.
- "The Preferred Partnership GRAT-A Way Around the ETIP Issue?" *ACTEC Journal*, Winter 2009 issue.
- Presentation on "International Aspects of Estate Planning," to the Lower Fairfield County Estate Planning Council, December 2009.
- "The FLP Quadrilogy," Trusts and Estates Magazine, December 2009.
- Presentation on "Partnership (Buy-Sell) Planning-Best Practices to Leverage & Pitfalls to Avoid," in connection with Inc. Magazine's Business Owners Council of Greater New York, Greenwich, CT, New York City and Roseland, NJ, November 2009.
- Presentation on "Planning for the Modern Family-A Flexible, Multi-Generational Approach to Preserving, Growing and Protecting a Family Legacy," Greenwich, CT, November 2009.
- "Special Report: The International Practice - Gift Tax Cost Depends On Form *And* Substance," *Trusts and Estates Magazine*, November 2009.
- Presentation on "Tax Law Developments And What It Means For Your Clients" Family Office Exchange 2009 Financial Executives Forum, Chicago, IL, July 2009.

- "Recent Proposals Could Impact Planning with GRATs," Estate Planning Newsletter, July 2009.
- Presentation on "Global Warning - Guiding You Through Difficult Times" to The Society of Trust and Estate Practitioners (STEP), Singapore, June 2009.
- Presentations on "Tax and Estate Planning Updates" at Connecticut CPE Seminars, Norwalk and Hamden, CT, June 2009.
- "Taking Stock (of Your Stock)-The Importance of Business Succession Planning." Exit Planning Newsletter, June 2009.
- Presentation on "Weathering the Perfect Storm: A Survival Guide for Families," Greenwich and New York, June 2009.
- "Planning For The Modern Family-A Flexible Multi-Generational Approach to Preserving Wealth While Providing For The Family," *Private Wealth Magazine*, May/June 2009.
- Presentation on "FLP Planning with GRATs and Defective Grantor Trusts," to financial professionals in Hong Kong and Singapore, May 2009.
- Withers Bergman Newsletter "Anticipated U.S. Transfer Tax Legislation-The Times They are a Changin," March 2009.
- "FLP Care and Maintenance - Family Offices Are Well Suited For Administering Family Limited Partnerships," *Private Wealth Magazine*, December 2008/January 2009.
- "The Resurrection - How Holman Revived Section 2703 Arguments - long thought dead and buried - to defeat a family limited partnership," *Trusts and Estates Magazine*, October 2008.
- "New Tax Law and What it Means for Your Clients," at the Family Office Exchange Financial Executives Forum, Chicago, IL, July 2008.
- "Sharing the Wealth," *Private Wealth Magazine*, June 2008.
- Presentation to the Connecticut Estate Planning Council on "International Aspects of Estate Planning," May 2008.
- Presentation to the Lower Fairfield County Estate Planning Council on "Family Limited Partnership Planning Beyond Strangi," December 2007.
- "Section 2703-Keeping Buy/Sell Agreements Intact for Estate Planning and Succession Planning of Family Owned Businesses," *Insights Magazine*, Autumn 2007.
- Presentation on "Freezing the Family Business: Keeping the Business in the Family and the Family in the Business," to the Greenwich Chamber of Commerce, November 2007.
- "'Beneficiary Withdrawal Powers in Grantor Trusts-A Crumm(e)y Idea?" *Estate Planning*, October 2007.
- "Nothing Succeeds Like Succession," *Private Wealth*, June/July 2007.
- "Leveraged Wealth Transfer Strategies for Hedge Fund Principals," March-June 2007.
- "Sabotaged-Don't Let a Buy-Sell Agreement Blow Up an Estate Plan," *Trusts & Estates Magazine*, April 2006.
- Presentation on "How Buy-Sell Agreements Can Unravel an Estate Plan," Spring 2006.
- Withers Bergman Newsletter "FLPs -Where Are We?" Fall 2005.
- "The Section 2701 Trap," *Trusts & Estates Magazine*, October 2004.

- Estate Planning Presentation at The New Jersey Bankers 2004 Financial Management & Trust Conference, New Jersey, October 2004.
- "Strangi II - Where From Here?," *Trusts & Estates Magazine*, February 2004.
- Prepared CLE accredited materials for "Essential Business Planning," Cannon Financial Institute Teleconference presented by Roy M. Adams and Charles A. Redd.
- "Protecting Beneficiaries from Themselves," to the New Jersey Bankers 2004 Financial Management and Trust Conference, October 2004.
- Contributions to Roy M. Adams' Cannon Financial Institute lecture series materials.
- Presentation on "Estate and Gift Tax Pitfalls in Business Transactions (Chapter 14)," July 2003.
- Numerous presentations for New Jersey Institute of Continuing Legal Education on Trusts and Estates topics.
- Children's Specialized Hospital estate planning seminars.