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September Event

Presentation by Samuel A. Donaldson

**Thursday, September 15, 2022
4:00 - 6:00 PM at the Portland Country Club**

Topic: What the Cool Kids are Doing in Estate Planning

In light of recent developments, some estate planning strategies have become especially popular. This presentation explains and evaluates several “hot” planning ideas, including spousal lifetime access trusts, charitable remainder trusts as beneficiaries of retirement accounts, ultra-long-term GRATs, and incomplete gift nongrantor trusts.

Samuel A. Donaldson [J.D. University of Arizona; LL.M. (Taxation) University of Florida] is a Professor of Law at Georgia State University in Atlanta. Prior to joining the Georgia State faculty in 2012, he was on the faculty at the University of Washington School of Law in Seattle for 13 years. During his tenure at the University of Washington, he was a five-time recipient of the Philip A. Trautman Professor of the Year award from the School of Law's Student Bar Association. Professor Donaldson served for two years as Associate Dean for Academic Administration and for six years as the Director of the law school's Graduate Program in Taxation. He teaches a number of tax and estate planning courses, as well as courses in the areas of property, commercial law, and professional responsibility.

In addition to Georgia State and the University of Washington, Professor Donaldson has taught law school classes at Northwestern University, the University of Florida, and Emory University. He is an Academic Fellow of the American College of Trust and Estate Counsel (ACTEC) and a member of the Bar in Washington, Oregon, and Arizona. Among his scholarly works, Professor Donaldson is a co-author of the popular West casebook, *Federal Income Tax: A Contemporary Approach*, and a co-author of the *Price on Contemporary Estate Planning* reference volume published by Wolters Kluwer.

An amateur crossword constructor, his puzzles have been published in *The New York Times*, *The Los Angeles Times*, *The Washington Post*, *The Wall Street Journal*, and other outlets. A perennial contender for *People Magazine's* “Sexiest Man Alive” honor, Professor Donaldson was recently notified by email of his selection to receive substantial sums of money from high-level Nigerian business officials in exchange for his bank account information.