

~ ~ 2023 Holiday Edition ~ ~

News of Interest

From

**SPEIDEL BENTSEN LLP
Wenatchee, Washington**



Russ Jean Lizette Tawnya David Tiffany

We wish you, our clients, friends, and colleagues a very happy holiday season. As we look toward the end of 2023 and anticipate the beginning of a new year, we reflect on the events of this year and say “Thank You” to all of you. We truly appreciate the confidence and trust you place in us.

Attorney **Russ Speidel** attended the Annual Meeting of the American College of Trust and Estate Counsel (ACTEC) in New Orleans in March. He attended the State Laws Committee, the Estate and Gift Tax Committee and the Elder Law Committee among others. Topics included recent developments nationally in change of domicile cases, no contest clauses in Wills, the estate of Prince, valuation of crypto assets, and practical considerations to observe with Special Needs Trusts.

Mr. Speidel serves our community by volunteering on the Wenatchee Downtown Association’s Economic Vitality Committee. He also continues as president of the Board of the nonprofit Friends of Ukraine Refugees, which actively supports 65 refugees families from the war in Ukraine who live in Central Washington.

Attorney **David Bentsen** kept up to date professionally by attending the Washington State Bar Association Real Property, Probate and Trust Section Midyear Meeting and Conference in June and the Seattle Annual Estate Planning Seminar in November, where he focused on Marital Property Agreements and the federal Corporate Transparency Act (“CTA”). The CTA is a new law effective January 1, 2024, which requires closely held businesses to disclose to the U.S. Treasury’s Financial Crimes Enforcement Network (“FinCEN”) information regarding managers and owners holding a 25% or more ownership interest in such businesses. If you believe this law may apply to your LLC or other closely held business, please contact our office and we will be happy to assist you.

We are seeking to hire an Associate Attorney. Speidel Bentsen LLP is an established leader in the practice areas of Complex Estate Tax Planning; Probate and Nonprobate Estate Planning; Elder Law; Administration of large and small Trusts and Estates; Real Property; Family Business; Public Charities; Immigration; Litigation and Mediation involving Trusts, Estates, Real Property and Closely Held Corporations. If you know of anyone who you believe would be a good fit for our firm, please ask them to contact Jean Speidel at 509-662-1211 or jean@speidelbentsen.com. We look forward to expanding our capacity to contribute to our community and provide practical solutions to the needs of our clients.

As personal highlights, Firm Administrator **Jean**, and **Russ Speidel** enjoyed family reunions at Lake Chelan in August and Minneapolis at Thanksgiving; **David Bentsen’s** oldest child started kindergarten this fall; Senior Legal Assistant **Tawnya Nelson** now assists Chelan County Mountain Rescue Association, a nonprofit volunteer organization dedicated to saving lives through search, rescue, emergency medical care and mountain safety education, as their Social Media Coordinator; Legal Assistant **Lizette Ornelas** began studies for her Associates Degree and Legal Assistant Certificate at Renton Technical College; and Legal Assistant **Tiffany Reyes** enjoyed coaching her son’s Wenatchee Youth Baseball Teams both in the spring and fall.

~ ~ May you have a truly joyous holiday season and a wonderful 2024! ~ ~