

Estate Planning Wisdom: DIY and AI-Generated Documents

August 25, 2026

By Herbert R. Fineburg, Danielle Friedman and Charles "Max" A. McCauley, III

Hosts Danielle Friedman, Herb Fineburg, and Max McCauley, estates and trusts attorneys, break down the risks of using AI tools and online services to prepare wills, trusts, and powers of attorney. Danielle, Herb, and Max walk through the execution formalities that vary by state, the trouble that surfaces when a will is not self-proving, and the court battles that can follow when questions of capacity or undue influence go unaddressed. They explain why business agreements, prenuptial agreements, divorce decrees, and beneficiary designations all take priority over a will, and share real examples of AI producing incorrect tax figures, hallucinated statutes, and advice that blends the law of multiple states together. The conversation closes with practical guidance on coordinating an estate plan with CPAs and financial advisors, choosing the right agents and fiduciaries, and reviewing documents every three to five years.

This has been a podcast of Danielle Friedman, Max McCauley and Herb Fineburg, attorneys with the law firm of Offit Kurman in its Philadelphia regional office. Attorneys Friedman, McCauley and Fineburg concentrate on matters of estates & trusts and business law matters including family and other closely held business succession planning.

We look forward to releasing another podcast next month. All podcasts can be found on the website of the law offices of Offit Kurman, which has offices from New York to Florida, and Texas to California with well over 300 lawyers to service all your legal needs.

If you are interested in learning more or have any questions, please feel free to contact Danielle at danielle.friedman@offitkurman.com, Herb at hfineburg@offitkurman.com, and Max at cmccauley@offitkurman.com.