

Balancing Your Estate for Harmony

November 18, 2025

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In this episode of 'Trust Us,' Danielle Friedman, Max McCauley, and Herb Fineburg discuss a complex estate planning scenario from a recent article. A father of three sons, two from his first marriage and one from a later relationship, grapples with the decision of whether to divide his estate equally among his children despite differences in their financial situations. The conversation delves into the potential problems with unequal distribution, the complexities of pot trusts, and the use of disclaimers. They highlight the importance of maintaining family harmony through equal treatment while addressing future wealth concerns. The team also emphasizes the necessity of updating estate plans regularly to reflect current wishes and relationships.

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.