

Publications & News

Publications and Presentations

Danielle Friedman, Herb Fineburg, and Charles "Max" McCauley III Release Episode 3 of Trust Us: Estate Planning Wisdom

May 17, 2024

In Episode 3, "How Long Should a Trust Last?," hosts [Danielle Friedman](#), [Herb Fineburg](#), and [Charles "Max" McCauley III](#) delve into the considerations and implications of establishing trusts, particularly regarding their duration. The discussion revolves around scenarios where trusts terminate at a specific age, leading to unintended consequences such as divorce settlements affecting trust assets.

The hosts emphasize the importance of crafting trusts that endure for the beneficiary's lifetime, highlighting the benefits of protecting assets from creditors, divorce, and taxation. They stress the need for flexibility in trust documents to adapt to changing circumstances and advocate for dynasty trusts that span multiple generations. Throughout the episode, real-life examples and legal insights underscore the complexities and nuances of estate planning, guiding listeners toward informed decisions for effective wealth preservation.

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.

Listen to Episode 3 here on [Spotify](#) and [Apple Podcasts](#).

Learn more:

Trust Us: Estate Planning Wisdom: <https://offitkurman.com/offit-kurman-podcast/trust-us-estate-planning-wisdom/>

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