

Publications & News

Publications and Presentations

Danielle Friedman, Herb Fineburg, and Charles “Max” McCauley III Release Podcast Episode 4 of Trust Us: Estate Planning Wisdom

June 14, 2024

In Episode 4, “The Crucial Role of Irrevocable Trusts in Estate Planning,” hosts Danielle Friedman, Herb Fineburg, and Charles “Max” McCauley III explore the vital role of irrevocable trusts in estate planning through a compelling case study.

A client gifted a 1.5% stake in his company to his three children without using irrevocable trusts, aiming to save on costs. When one child faced divorce, the stake became vulnerable, exposing family finances and straining relationships. Further complications arose when the deceased child's surviving spouse inherited their share, leading to family conflicts.

The hosts discuss the missed opportunities for protection, emphasizing how irrevocable trusts can shield assets from divorce, creditors, and ensure family legacies. Learn crucial lessons on proactive estate planning to protect both assets and family bonds. Join us for this insightful discussion on safeguarding your legacy.

Listen to the latest episode here:

- Spotify: <https://open.spotify.com/show/1JTrcMvLdYYTe9AKV3NuOp>
- Apple Podcasts: <https://podcasts.apple.com/us/podcast/trust-us-estate-planning-wisdom/id1729618729>
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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.

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