

Dealing with Loss: Understanding Your Estate Planning Steps

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In this episode of Trust Us: Estate Planning Wisdom, Danielle Friedman, Herb Fineburg, and Charles Max McCauley walk through the essential first steps after the loss of a spouse. From handling funeral arrangements to locating assets, understanding Social Security benefits, and navigating probate, the hosts provide practical, compassionate guidance for surviving spouses. This episode emphasizes what truly matters in those early days—taking time to grieve, seeking trusted professional help, and knowing you don't have to navigate the process alone.

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.