

Federal Estate Tax Exemption

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

In this episode of Trust Us, Danielle Friedman, Herb Fineburg, and Max McCauley discuss the significant changes anticipated with the sunset of the Federal Estate Tax Exemption. They explain what the exemption is, how it impacts estates, and the strategic planning necessary to navigate potential changes post-2025. Topics include essential planning techniques, potential legislative changes, and advice on how to prepare for the uncertainties.

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.