CUMMINGS & LOCKWOOD LLC

ESTATE PLANNING FOR INDIVIDUALS IN THEIR EARLIER YEARS

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Author: Ben Almonte

David W. Thal, a trusts and estates attorney in Cummings & Lockwood’s Private Clients Group in Stamford, Connecticut, discusses how professional advisors can assist young clients in their estate planning. Topics include the basic documents every adult should have, such as a will, powers of attorney and advance medical directive, as well as a discussion of the beginning of a gifting plan based around life insurance and 529 accounts. (18:25)

This presentation was part of a firm-hosted seminar for professional advisors in November 2018, entitled “Estate Planning for the Different Stages of Your Client’s Lifecycle.”