



## POSTMORTEM PLANNING

November 2, 2021

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In this video, ACTEC (The American College of Trusts and Estate Counsel) Fellows, Laura Weintraub Beck, Vice Chairman and Chair of the Private Clients Group of Cummings & Lockwood LLC and Jonathan P. (JP) Lee of Sojourner, Caughman & Thomas, LLC give a concise summary of estate tax planning, disclaiming, decanting, portability options and the impact of pre-mortem decisions on postmortem planning.

