



Estate and Gift Tax Planning and the TCJA

It is somewhat unusual to highlight 2026 taxes in 2024, but we are in an unusual situation: Many of the provisions in the 2017 Tax Cuts and Jobs Act (TCJA) will expire at the end of 2025 unless Congress acts to extend them. Taxpayers need to be aware of how they will be affected so they can [...]

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Estate Planning for Blended Families

Estate planning can be more complicated for blended families than for traditional families. Entering into a new marriage when one or both new spouses have children from a previous relationship poses its own unique challenges, and it is important to consider what will happen if either of you pass away. An estate planning attorney can [...]

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Considerations When Choosing Beneficiaries

Beneficiaries are a crucial part of your estate plan. They are the people or organizations that will ultimately benefit from your estate when you pass away. Your beneficiaries can receive money or anything else you pass down to them, such as Social Security disability, savings and checking accounts, life insurance policies, retirement plans, and [...]

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A Summary of Medicare's Four Parts

As an individual in your mid-60s, you may be faced with important life decisions, including when to retire and whether to downsize. One crucial decision you need to make concerns how you will access Medicare. You must choose which Medicare option to take and must do so in a timely