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FIRM NEWS

Joshua Rubenstein Quoted in *Morningstar* Article on Effective Estate Planning

May 6, 2015

Trusts and Estates national head Joshua Rubenstein is quoted in this article on alternatives to A/B estate plans for married couples. Josh describes the benefits of a "disclaimer" strategy in estate planning—an individual leaves everything to his or her spouse but gives the spouse the option to "disclaim," or turn down, all or part of the inheritance and have it go into a bypass trust. This way, the spouse can make an informed decision on whether or not to use the A/B plan, based on his or her finances and the latest estate tax laws. "It's like playing chess with your finger still on the piece," said Josh. ("Is Your Estate Plan Obsolete?" May 5, 2015)

CONTACTS

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