

JULY 5, 2023 | PUBLICATION

The Estate Planner, July/August 2023

Download *The Estate Planner*

SERVICE LINE

Corporate, Tax and
Transactions
Taxation
Wealth Strategies

RELATED ATTORNEYS

Jon P. Skelton
G.P. Diminich
Cheryl L. Gordon
David J. Rectenwald

MEDIA CONTACT

Wendy M. Byrne
wbyrne@shumaker.com

Below is a brief glance of what you'll find in the July/August 2023 issue of *The Estate Planner*.

- Estate planning in a digital world
- Contributing to a 401(k) plan: Traditional or Roth?
- Decisions, decisions: Naming a successor fiduciary is important to an estate plan
- Estate Planning Red Flag: You're considering a self-directed IRA

For more information, please contact a Shumaker attorney in any of these service lines:

Wealth Strategies
Corporate, Tax and Transactions