

MARCH 5, 2024 | PUBLICATION

## The Estate Planner, January/February 2024

**Download *The Estate Planner***

### SERVICE LINE

Corporate, Tax and  
Transactions  
Taxation  
Wealth Strategies

### RELATED ATTORNEYS

Jon P. Skelton  
G.P. Diminich  
Ashley S. Hodson  
Lynn F. Chandler  
David J. Rectenwald

### MEDIA CONTACT

Wendy M. Byrne  
wbyrne@shumaker.com

Below is a brief glance of what you'll find in the January/February 2024 issue of *The Estate Planner*.

- Married couples: joint or separate trusts?
- Beware of tax traps when estate planning for non-U.S. citizens
- Your beneficiary designations may be obsolete: review and update as needed
- Estate Planning Red Flag: You've left specific assets to specific heirs

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

Wealth Strategies  
Corporate, Tax and Transactions