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Samuel DiPietro Authors AZ Big Media Article on Estate Planning Essentials

Spencer Fane attorney Samuel DiPietro outlined each of the most important estate planning documents in a recently published article for *AZ Big Media*.

The article, Best Practices to Create Essential Estate Planning Documents, originated as a series of blog posts on the firm's website. Samuel provides an overview of revocable trusts, pourover wills, durable powers of attorney, health care powers of attorney and living wills, and HIPAA release forms. He also shared estate planning documents best practices and common factors that should trigger an estate plan review.

"The phrase 'it's a journey not a destination' rings especially true in the context of estate planning; based on your stage in life, your estate plan should be reviewed and updated as necessary," Samuel shared. "For example, persons undergoing substantial life changes should consider annual or biannual reviews of their estate plan. Whereas persons with less life changes may consider reviewing their estate plan every two to three years."

At Spencer Fane, Samuel collaborates with families and their advisors to create customized estate plans that consider the specific needs of each family, ensuring the protection and seamless transfer of wealth. He has extensive experience in crafting estate plans tailored to the unique requirements of modern families.

Read the full article here. Please note, a subscription may be required.