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Spencer Fane Attorney Highlights Essential Estate Planning Considerations

Spencer Fane attorney Samuel DiPietro discusses estate planning challenges unique to business owners in articles recently published by *Wealth Management* and *AZ Big Media*. Additionally, Samuel emphasizes estate planning considerations for Baby Boomer Business Owners (BBBOs) in another article featured in *Westlaw Today*.

In Samuel's articles and firm blog post, he showcases specialized strategies to achieve personal and financial objectives while mitigating risks. He addresses the importance of specific estate planning documents, planning for incapacity, and ensuring survivor liquidity, and provides an overview of common trust structures' benefits and risks.

"Business owners should work with experienced advisors to develop comprehensive plans addressing tax minimization, asset protection, liquidity needs, and succession objectives," Samuel wrote. "With proper planning, business owners can preserve their life's work for future generations while achieving their personal and charitable goals."

At Spencer Fane, Samuel develops customized plans for clients at all wealth levels and life stages, including crafting comprehensive strategies that help clients secure their futures and protect their families and beneficiaries. He specializes in wealth, tax, trust, and estate planning; estate and trust administration; probate; privately held business and corporate planning; asset protection; and probate matters.