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Spencer Fane Team Presents at MOKAN Trust & Financial Services Conference

Spencer Fane attorneys Samuel DiPietro and Serena O'Neil presented at the 46th annual MOKAN Trust & Financial Services Conference, a May 14-16 event in Overland Park, Kansas.

During their breakout session, Planned Succession: Estate Planning Considerations Prior to Exiting the Business, the team harnessed their insights as tax, trusts, and estates attorneys to discuss the federal transfer tax system and why it is especially relevant for business owners planning for the future. They explained key estate planning documents and corporate documents that business owners need to implement ahead of a sale, state income tax planning options, and how trusts can help business owners save money upon the sale of their business.

At Spencer Fane, Samuel collaborates with families and their advisors to develop customized estate plans that promote financial literacy, preserve family history, and convey the deeper meaning behind family wealth. Serena likewise provides a person-centered approach when helping her clients to create estate plans that put their wishes at the forefront.