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Does Your Estate Plan Talk With Your Investment Plan?



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Estate Planning & Wealth Transfer

Anne Dickerson, of counsel in Gould & Ratner's Estate Planning Practice, presented in conjunction with the investor advisor and financial planner from the McMullan Team at William Blair.

With about 40 people in attendance, the William Blair advisors started the program with an overview of the need to coordinate investment planning with a client's estate plans. Anne then spoke giving specific cases studies highlighting issues estate plans may have and suggested tax efficient strategies to best implement the client's goals.

To view the presentation please visit [here](#).