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LEARN | Beyond Taxes: Reasons for Estate Planning

3 minutes

There are many reasons beyond taxes for clients to have estate plans in place. As their advisor, you can make them aware of these reasons and encourage them to plan accordingly.

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Did You Know?

In 2021, only 2,584 U.S. estates paid federal estate taxes.*



Key Takeaway

A well-thought out estate plan can help improve legacy outcomes for your clients and their families.

Understanding the Nontax Reasons for Estate Planning

Select an area to learn more about how it applies to your role as financial advisor.

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Next Step

Ask clients if they have their core estate planning documents in place.

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*Source: Hodge, Scott. "Putting a Face on America's Estate Tax Returns." Tax Foundation, <https://taxfoundation.org/estate-tax-returns-data>, Accessed May 11.

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Publication details: Thursday, September 26, 2024 12:07 PM

Page ID: 46148 - <https://www.eatonvance.com/reasons-for-estate-planning.php>