

Whether the client came to you with a CPA or you had to help find one, think about collaborating with him or her to come up with a game plan. Your client will be better served by having two reliable professionals watching out for his or her interests from the beginning. You can also apportion tasks according to which party is best qualified to carry them out.

Finally, you might contemplate involving less senior members of your own staff in the planning process. It's good practice that will make them more valuable to you later on. Numerous courses and training days cover the essentials in some detail so you won't have to worry about doing the fundamental training yourself. Most of these are team taught by experienced

lawyers and accountants and also qualify for continuing professional education credit (we often help design and teach these seminars, and would be glad to answer any questions).

Ensuring that your iron-clad estate plan will stay iron-clad is not a huge undertaking; it just takes a little planning.



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