

Courtney J. Donahue Tasner Co-Presents Case Study to the Western New York Estate Planning Council



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BUFFALO, N.Y. – Courtney J. Donahue Tasner, Partner and member of Lippes Mathias LLP’s Trusts and Estates Practice Team, co-presented a case study to the Western New York Estate Planning Council alongside Brian Pearson of Valuation Advisors, LLC.

The presentation analyzed Michael Jackson and Britney Spears; two entertainment superstars whose legal battles included estate tax battles and publicized guardianships, highlighted important lessons for estate planning related professionals, and provided procedural steps to being placed under a guardianship in New York State.

Courtney J. Donahue Tasner has extensive experience working with a variety of clients and families on estate planning matters. She partners with financial advisors and tax professionals in the area to ensure her clients’ estate plan is thorough and appropriate for each individual client. Such plans range from foundational estate planning with Last Will and Testaments, Health Care Proxies and Power of Attorney documents, to more advanced planning with

trust documents for a variety of complex planning needs including long term care planning. Ms. Donahue Tasner also works jointly with other practitioners whose clients require planning with government-approved Supplemental Needs Trusts.

About Lippes Mathias LLP

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