

APRIL 2021 DISCUSSION QUESTIONS

1

ESTATE PLANNING INSIGHTS IN THE AGE OF COVID-19

Have more of your clients decided to do their estate planning? If so, tell us about their motivations. Do you have any estate planning insights to add to Phil Herzberg's cover article?

2

A FAMILY LOAN?

Herzberg talks about the possibility of structuring a family loan as a tax-free wealth transfer approach. Have you tried this approach? Tell your peers about it. If you haven't tried it, what are your thoughts about it?

3

AMERICAN RESCUE PLAN ACT

What planning opportunities do you see in the ARPA? Will your clients be taking advantage of the additional time to file their taxes? What aspects of it do you think will be most beneficial to your clients?

4

THE PROFESSION'S ROLE IN FINANCIAL LITERACY

Mark Tibergien talked about financial literacy in his column. Do you participate in any financial literacy efforts? What do you think the profession's role in financial literacy is?

5

FACILITATING VIRTUAL CLIENT MEETINGS

How many of the recommendations in this month's research do you currently do when facilitating virtual meetings?