



HOW TO SUCCESSFULLY ADDRESS COMMON SOFT ISSUES IN ESTATE PLANNING CONFERENCES

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In this video, Daniel G. Johnson, a Principal in Cummings & Lockwood's Private Clients Group and based in the firm's Stamford, Connecticut office, covers the most appreciated advice during an estate planning conference which can frequently stem from a discussion about a soft issue that is unrelated to tax savings. Some common issues and concerns will be reviewed, along with advice about them that resonates with clients.

The presentation was given at Cummings & Lockwood's annual Professional Advisors Seminar on December 3, 2025 at the Wee Burn Country Club in Darien, Connecticut.

