



## PRACTICAL STEPS TO TAKE WHEN DOWNSIZING FROM A HOME

November 2018

Kathleen M. Merrigan, a residential real estate attorney in Cummings & Lockwood's Private Clients Group in Greenwich, Connecticut, discusses the tax and practical steps individuals should be taking before they downsize, including figuring out the cost basis in their home, preparing for sale, cleaning up open permits, and resolving the estate tax lien from a predeceased spouse. (11:00)

This presentation was part of a firm-hosted seminar for professional advisors in November 2018, entitled "Estate Planning for the Different Stages of Your Client's Lifecycle."

