

Advisor Series - Wills vs. Trusts

Event

Amundsen Davis, Appleton Office
December 2, 2025 | 4:00 PM CT

Amundsen Davis's in-person series for advisors is intended to facilitate a collaborative relationship among business advisors so we can better serve our clients.

Wills and trusts are key estate planning tools that help clients manage and distribute assets according to their wishes, both during life and after death. While a will directs asset distribution and guardianship through the probate process, a trust offers greater control, privacy, and potential tax advantages by avoiding probate altogether. As advisors, understanding these instruments is essential to guiding clients toward strategies that align with their long-term financial and legacy goals.

Join us for a presentation where we will discuss:

- Wills and the probate process
- Revocable trusts
- Irrevocable trusts and tax planning

Location:

At Amundsen Davis's Appleton Office
2800 East Enterprise Ave., Appleton, WI

PROFESSIONALS

Kevin L. Eismann
Partner

Michael V. Shaw
Associate

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