

Advisor Series - Discover the Impact of the One Big Beautiful Bill on Estate Planning

Event

Amundsen Davis, Appleton Office
November 4, 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.

With the One Big Beautiful Bill Act now approved, sweeping changes are set to transform taxation, retirement planning, and estate strategies. This presentation will break down the key economic, tax, and financial planning provisions included in the legislation—and explain what they mean for you and your clients. From new opportunities to emerging risks, we'll explore how this landmark bill is reshaping the estate planning landscape.

Join us to learn how the bill:



Changes taxation and creates planning opportunities



Impacts estate planning strategies



Affects retirement planning and investment decisions

Location:

At Amundsen Davis's Appleton Office

2800 East Enterprise Ave., Appleton, WI

PROFESSIONALS

Andrew C. MacDonald
Senior Counsel

Michael V. Shaw
Associate

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