

# Spots on the X-Ray: Identifying Ways to Add Value to Clients

Speaking Engagement  
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During this presentation, Amundsen Davis Estate Planning Attorneys shared ways to help advisors issue spot life events or other triggers that may impact their client's estate and tax plan. In addition, they discussed the steps that should be taken after issue spotting to take advantage of opportunities or mitigate risks.

## PROFESSIONALS

Jacqueline L. Messler  
Partner

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