Published on *The National Law Review* https://natlawreview.com

Counseling Issues in Estate Planning - Bootcamp for Financial Advisors, Session 1, Part 3 [VIDEO]

Article By:

Family Law & Domestic Relations Practice

Wayne Zell's extensive background as an attorney, CPA, and entrepreneur provide him a wealth of insight to his clients' business operations and challenges. In addition to working at law firms, he has worked for three of the former "Big Eight" accounting firms. His understanding of small business dynamics grew from the time he served as General Counsel and CFO of YellowBrix, Inc., an internet content provider and enterprise software developer.

This is the 3rd of 6 videos from Session 1 (March 16, 2016) of Wayne Zell's *Estate Planning Bootcamp for Financial Advisors: The Advisor's Advantage***.** This session focuses on understanding the counseling issues involved in most estate plans, the elements of a typical will and living trust, and why all estate plans require asset management. You can see Part 1 here and Part 2 here.

National Law Review, Volume VI, Number 139