Combining Trusts to Reduce Complexity and Costs Can Be Harder Than You Think

California Lawyers Association on **February 24, 2025**

Complex clients often require equally intricate planning. Over time, these complexities can result in the establishment of multiple trusts for future generations. As children and grandchildren inherit these trusts, it's common for them to approach their attorneys with the question: 'How can we simplify this?' For many planners, the immediate response is to explore the possibility of consolidating these trusts. In this episode of *Trust Me,* Andrew Katzenstein and Cary Robbins share their insights on the key considerations when combining trusts.