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February 2026 Estate Planning

Top Stories

QUESTION OF THE MONTH:

Q: In Illinois, who is entitled to receive a copy of a trust?

A: Under the Illinois Trust Code, individuals generally entitled to receive a copy of a trust include:

- The Settlor:** The person who created the trust typically has the right to receive a copy.
- Trustees:** Current trustees responsible for managing the trust are entitled to a copy.
- Beneficiaries:** Individuals named as beneficiaries of the trust are also entitled to receive a copy upon request.

If a beneficiary is a minor or otherwise legally unable to receive the trust document, their legal representative may obtain a copy on the beneficiary's behalf.



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Tucked into the One Big Beautiful Bill Act (OBBBA) enacted in July 2025 is a new savings program designed to give American children a financial head start.

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If you are leaving property to a grandchild, there is a tax you should know about. The generation-skipping transfer tax affects property passed to a grandchild in a will or trust.

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The ultrawealthy provide insights about how to use trusts to transfer and protect wealth and how to have money conversations with heirs.

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When to Fire a Trustee

Removing a trustee is a serious step that can be costly and time-consuming. However, it may become necessary when a trustee's actions (or lack thereof) threaten the integrity of the trust.

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