Katie Dorval Writes "6 Things I know … that could go wrong with your estate plan"

BY KATHERINE R. DORVAL • DECEMBER 16, 2025

Estate plans are meant to provide clarity and peace of mind but too often, small oversights can lead to significant and costly consequences. In an article in the *Worcester Business Journal*, Katie Dorval outlines six common issues she sees that can derail even well-intentioned estate plans. From outdated documents to overlooked tax implications, these pitfalls highlight why estate planning is not a one-time task, but an ongoing process that requires careful attention and regular review. Here is an excerpt:

> **5) Ignoring estate taxes and debts**. Many people assume their heirs will receive everything they leave behind, but estate taxes and outstanding debts can significantly reduce what's passed on. Without proper tax planning, a large estate could be hit with a hefty estate tax bill (which is especially true for Massachusetts residents), and creditors may have a claim to assets.

Continue reading "6 Things I know … that could go wrong with your estate plan" on the *Worcester Business Journal* website.

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