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Katherine Dorval Offers Guidance on Including Vacation Homes in Your Estate Plan

BY KATHERINE R. DORVAL • AUGUST 19, 2026

When creating or modifying your estate plan to include a vacation home, it is important to consider the financial and emotional value of the vacation home. One common pitfall is assuming children want the home and can afford to maintain the home.

In a recent article for *Wealth Management*, Katherine Dorval explains four key areas to consider when determining who will inherit your vacation home. Here is an excerpt:

> The first step is always…to have a frank discussion with…children about what they want and what they can realistically afford. Clients may be surprised at the results. Realistically, it's hard for anyone to predict what their situation will be decades from now after you're gone.

Read the article "Help Clients Plan Who Inherits Their Vacation Home" on the *Wealth Management* website.

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