

"Industry News & Helpful Hint" Newsletter

May 19,
2026

Trusts & Estates news article of the week:
"Multigenerational Households: Avoiding Succession Frictions With Trusts"



Summary: In the article "Multigenerational Households: Avoiding Succession Frictions With Trusts," author Tom Burroughes highlights how the massive ongoing generational wealth transfer—estimated to involve up to \$110 trillion—is increasingly complicating the inheritance of family homes. Driven by a dramatic rise in multigenerational living arrangements, which Pew Research shows have quadrupled since the 1970s, shared family properties frequently become primary sources of succession dispute. Burroughes outlines how conflicts often arise over who gets to use the property, who is responsible for maintenance and ongoing expenses, and how to handle buyout requests when one sibling wants to liquidate their share. These issues are further magnified within modern blended families, where the competing interests of surviving second spouses and biological children create inherent friction over property rights.

To mitigate these familial frictions, Burroughes presents insights from estate attorney Michael Wargon, who emphasizes the necessity of proactive communication and structured legal planning. Wargon recommends utilizing advanced trust mechanisms, such as dynastic or generation-skipping trusts, to manage real estate assets collectively. For instance, a dynastic trust can own a Limited Liability Company (LLC) that holds the title to the property, with a governing board composed of adult children managing operations to ensure fair use and financial accountability. Ultimately, the article underscores that flexibility is vital in modern estate planning; by incorporating adaptable terms or utilizing strategies like trust "decanting," families can keep their estate structures up to date and protect cherished ancestral homes from becoming sources of long-term litigation.

Read the entire article by clicking [HERE](#).

Last week's Trusts & Estates news article:
"IRS Chief Claims Crackdown On Wealthy Tax Evaders Will Continue"

Last week's Helpful Hint:
"Pricing Options: Calls, Puts"

[Read more HERE](#)

Notes:
Fri, May 22:
Our office will be closing at 3:00 p.m. Eastern Time for the Memorial Day holiday weekend. We will Tue, May 26 at 9:00 a.m.

Online services are always available except during scheduled maintenance (see below).

Avoid sending portfolios for pricing between Saturday at 8:00 PM and Sunday at 8:00 AM Eastern Time. Intercontinental Exchange (ICE), our data provider, is offline during that time for maintenance.

Helpful hint of the week:
"Financial Identifier Translator"

We received a request last week asking about converting from one financial identifier to another. Here is a website to take a look at:

[Financial Identifier Translator | Convert ISIN, WKN, CUSIP, SEDOL & VALOR](#)



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