

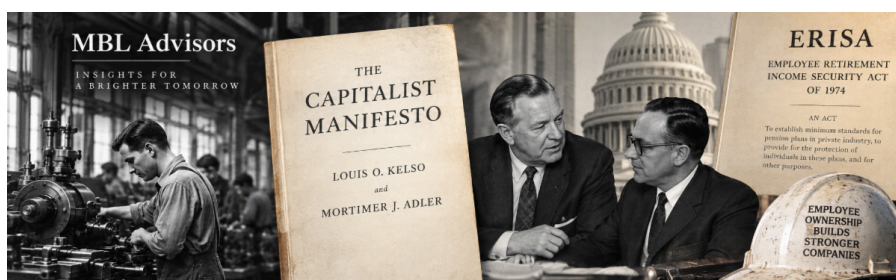
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September Newsletter | 2026

Summer History Series: Part III

A History of Employee Stock Ownership in America



Earlier this summer we [announced a 3-part history series](#) about some important financial and tax policy in American history. The first two installments were on [federal estate taxes](#) and [retirement planning](#).

This newsletter contains our third and final installment in the series, on the history of ESOPs in America. We hope you enjoy reading it!

[Read Part III](#)

Estate Planning

A Practical Guide to the Essential Decisions



Foundational Estate Planning

A Practical Guide to the Essential Decisions

We have updated our general overview of foundational estate planning (sometimes referred to as our Estate Planning 101 document). Estate planning can feel daunting, but the essential decisions are surprisingly straightforward.

Who should benefit from your estate, and who do you trust to see your wishes through? Our revised overview breaks the process down into those questions and the practical choices that follow.

[Read the Foundational Estate Planning Guide](#)

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