

Kelsey Berns Provides Strategies for Excess 529 Account Savings in Blue Magazine Article

Reinhart shareholder [Kelsey Berns](#) recently authored an article for Blue Magazine titled "[Maximize Your Family's 529 Account: Strategies for Excess Funds](#)." In it, Kelsey provides insights on the 529 account, a tax-advantaged savings program for education, and discusses strategies for managing excess funds, including options to change the beneficiary or withdrawing the funds while considering the tax implications.

Kelsey is a shareholder in Reinhart's [Trust and Estates Practice](#), advising high-net-worth individuals and families on estate planning matters, such as complex wealth transfers, charitable giving and tax strategies. She frequently counsels business owners on succession planning strategies designed to maximize value and minimize income and wealth transfer taxes.

POSTED:

Jan 22, 2024

RELATED PRACTICES:

[Trusts and Estates](#)

<https://www.reinhartlaw.com/practices/trusts-and-estates>

RELATED PEOPLE:

[Kelsey L. Berns](#)

<https://www.reinhartlaw.com/people/kelsey-berns>

These materials provide general information which does not constitute legal or tax advice and should not be relied upon as such. Particular facts or future developments in the law may affect the topic(s) addressed within these materials. Always consult with a lawyer about your particular circumstances before acting on any information presented in these materials because it may not be applicable to you or your situation. Providing these materials to you does not create an attorney/client relationship. You should not provide confidential information to us until Reinhart agrees to represent you.