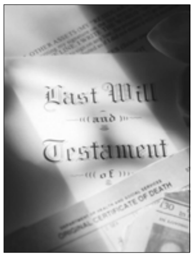

Estate Planning and Wealth Management Practice

Estate and Wealth Planning and Administration

Hoge Fenton's estate planning and tax attorneys offer practical and proactive approaches to the issues faced by our clients, both in estate planning and estate or trust administration matters. Through the breadth and depth of our attorneys' experience, we can offer our clients creative solutions to tax and non-tax problems. We believe it is important to listen to our clients and work with them to implement their personal and family goals and values. We believe that the best estate planning attorneys are those who offer their clients solid legal, tax, and business experience, as well as non-legal skills as counselors and advisors.

Chair:

Steven D. Siner

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Personal Estate Planning

Our estate planning practice includes the traditional basic services such as preparation of revocable trusts, wills, and financial and health care powers of attorneys, as well as counseling in estate, gift, and income tax matters. To achieve our clients' goals of tax savings, we also employ more sophisticated planning techniques such as irrevocable life insurance trusts, qualified personal residence trusts, grantor annuity trusts, and charitable remainder or lead trusts.

Closely Held Business Planning

When the client's assets include a closely held business, we work with the client and the client's family to examine their goals for passing on the family business and to develop a business succession plan. This kind of planning often involves attorneys in our Business & Tax Group, as well as the client's accountant and other financial advisors. We bring our tax and non-tax experience to the table in this kind of planning, which often involves complicated family issues.

Estate and Trust Administration

We work with individual executors, trustees, and corporate fiduciaries to settle estates and administer trusts as efficiently and promptly as possible. We delegate many of the tasks in what we call "post death work" to the capable legal assistants in our group, who can handle those tasks efficiently and economically.

Trust and Estate Litigation

When disputes arise in probate or trust matters, we work with our litigation attorneys to represent both beneficiaries and executors or trustees to resolve those disputes, whether through mediation or litigation. Representing clients in such disputed matters requires us to use not only legal and litigation skills, but also the ability to deal with the emotional non-legal issues that often arise in trust and estate litigation.