

## ESTATES AND TRUSTS

We believe the best estate planning attorneys offer sound solutions and peace of mind.

Our trusted, experienced attorneys provide sophisticated legal, tax, and business services from cradle-to-grave, as well as skilled counseling and advice.

We work closely with you – and your other professional advisors - to understand the process. We implement creative yet conservative solutions to help you achieve your desired result. Our knowledge is broad and deep, including expertise in taxation, foreign assets, and cross-border relationships.

### Services

#### Estate and Wealth Planning and Administration

- *Practical, proactive approaches*
- *Creative solutions to tax and non-tax problems*

#### Personal Estate Planning —*traditional and sophisticated services including:*

- Revocable trusts
- Wills
- Counseling in estate, gift and income tax
- Financial and health care powers of attorney
- Qualified personal residence trusts
- Charitable remainder or lead trusts
- Irrevocable life insurance trusts
- Grantor annuity trusts

#### Closely Held Business Planning

- We can help you develop goals for passing on the family business, and create a business succession plan
- We will guide you through complicated family issues by bringing our tax and non-tax experience to the table

#### Estate and Trust Administration

- We work with executors, trustees, and corporate fiduciaries to settle estates and administer trusts as efficiently and promptly as possible

- We delegate many of the post-death tasks to capable paralegals in our group who handle those tasks efficiently and economically

## **Publications**

- **How to Discuss the Dreaded No Contest Clause**

## **Trust and Estate Litigation**

Unfortunately, disagreements sometimes arise over the administration and distribution of an estate. When that happens, we can help.

For more information about our experienced trust and estate litigators, please **click here**.

## **Primary Contact**

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## **Related Attorneys**

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