



## Estate Planning

Clients find that our integrated and individualized approach to trust and estate planning plays a key role in effective wealth management. Unlike many attorneys where estate planning and administration is a small portion of their practice, our Estate Planning attorneys focus their practices almost exclusively on estate planning, trust and estate administration, estate and gift tax and related family business issues.

We provide guidance in a number of areas, including:

- Business succession planning
- Charitable giving
- Conservation easements
- Estate planning
- Probate and trust administration
- Family-run businesses, limited liability companies, limited partnerships and corporations
- Durable Power of Attorney for Financial and Property Management; Durable Power of Attorney for Health Care Decisions Including Health Care Directive
- Prenuptial, status of property and community property agreements
- Private foundations
- Estate and Gift Tax planning

### AREAS OF FOCUS

#### Estate Planning

Our Estate Planning attorneys focus their practices on developing individualized estate plans. Our goal is to help clients convert their intentions into specific strategies in a practical and cost-effective manner. We address our clients' estate and business planning needs using an approach that is comprehensive, tailored to each client's unique situation and implemented with well-drafted legal documentation.

#### Trusts

Clients appreciate our depth of experience with various types of trusts, including charitable lead trusts, charitable remainder trusts, dynasty trusts, education trusts, irrevocable life insurance trusts, (and other irrevocable trusts) grantor retained annuity trusts, qualified domestic trusts, qualified personal residence trusts and testamentary trusts, among others.

#### Trust and estate dispute resolution

Many estate planners have little, if any, litigation and dispute resolution experience. Many litigators have no trusts and estates experience. We are able to draw upon the litigation experience of our attorneys and our Estate Planning team's collective experience in trusts and estates to help clients and their families resolve disputes that may currently exist or develop later, including through mediation, arbitration and litigation.

#### Closely held businesses

Our attorneys counsel individuals and families on the development and governance of closely held businesses. We help determine the appropriate choice of entity and capital structure, and handle governance, operation and tax issues. In conjunction with attorneys from our Business practice, we advise closely held businesses on additional matters, including employment issues, employee benefits and ESOPs, real estate matters, intellectual property, the sale or disposition of the business and other issues that arise for these businesses.