

## Trusts, Estates & Charitable Organizations

As a long-time trusted advisor to our clients, bringing peace of mind is our top priority. We understand many of the complexities and difficulties individuals and families face when transferring their assets to their beneficiaries upon death, passing on a property or a family business or preparing for transfer tax planning. At Foster Garvey, we bring customized, integrative solutions to all types of estates with proactive strategic planning, combined with innovative estate and tax planning techniques. Our experienced Trusts & Estates Litigation practice also provides practical counsel in connection with dispute resolution matters.

Our attorneys regularly advise clients ranging from high-net-worth individuals, business owners and executives, family-owned and closely held businesses to beneficiaries of dynasty trusts on sophisticated estate planning, estate and trust administration, wealth transfer and transfer tax minimization, and trusts and estates disputes. The practice is one of the few in the Pacific Northwest that can perform sophisticated probate and trust administration and international estate planning. The group's attorneys cover the West Coast and are admitted in Washington, Oregon, Idaho, Alaska and California.

The practice is recognized among the world's top legal advisors by *Chambers High Net Worth* with several attorneys recommended as Private Wealth Advisors, applauding the firm and its practitioners for its proven ability to deliver solutions to clients facing complex trust and estate issues; its strong relationships and reputation in the high-net-worth community; and its steadfast commitment to helping family and closely held businesses. Several are named among the *Best Lawyers in America*®.

We provide guidance in a number of areas, including:

- Wills, living trusts, durable power of attorney and community property agreements

### Service Contacts

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### Areas Of Focus

Charitable & Tax-Exempt Organizations  
Trusts & Estates Litigation

### Related Services

Family-Owned & Closely Held Businesses  
Tax

- Prenuptial agreements, postnuptial agreements and cohabitation agreements
- Succession planning for family businesses
- Estate and gift tax planning and tax return preparation
- Irrevocable life insurance trusts
- Grantor retained annuity trusts
- Private foundation formation
- Charitable giving planning and tax-exempt organizations
- International estate planning
- Administration of trusts and estates, including probate
- Guardianships
- Advising heirs, beneficiaries and fiduciaries as to their rights, interests and obligations in an estate or trust
- Will contests and other trust and estate dispute resolution
- Conservation easements
- Prenuptial, status of property and community property agreements

### **Estate Planning**

Our Estate Planning attorneys help our clients develop personalized estate plans. Our goal is to 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 situation and implemented with well-drafted legal documentation.

### **Trusts**

Clients appreciate our in-depth experience with various types of trusts, including charitable 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.

### **Trusts & Estates Litigation**

Foster Garvey has one of the most experienced Trusts & Estates Litigation teams in the Pacific Northwest. Attorneys, who are licensed in Washington, Oregon, Idaho, Alaska and California, have successfully litigated numerous landmark will contests and trust cases. At Foster Garvey, we are uniquely situated to provide clients with excellent representation in any will contest, trust claim or contested guardianship that may arise, including helping them and their families resolve disputes through mediation, arbitration or litigation. All of the attorneys, paralegals and assistants in our group understand that trust and estate litigation often involves very sensitive and difficult family dynamics, which we handle with great care and confidentiality.

### **Family-Owned & Closely Held Businesses**

Foster Garvey's Family-Owned & Closely Held Business group is made of strategic advisors and core practitioners who understand the intersection between law and the unique challenges of running a family business. Our attorneys regularly advise this unique segment of clients develop a solid business and legal infrastructure positioned for growth and longevity. We advise diverse industries and sectors that range in size from small businesses to multinational corporations in navigating and avoiding risks that can threaten a family business, such as intra-and intergenerational rivalries among family members, compensation disputes, breaches of fiduciary duties by family members, death and succession issues, integrating non-family members into the company structure, and difficulties in determining lines of authority.

### **Blog Posts**

4th Annual Family and Closely Held Business Summit

*Family Business Bulletin*, 10.10.18

New Regulations for the Partnership Tax Audit Rules Set to Finalize on September 18, 2017

*Family Business Bulletin*, 8.23.17

Why Does the IRS Care What the Michael Jackson Name and Image is Worth?

*West Coast Trusts & Estates Litigation*, 2.14.17