PRACTICE-AREAS

Wills, Trusts & Estate Planning

Our highly experienced wills, trusts and estate planning team focuses on strategies that can help you preserve and safeguard wealth. We offer a complete range of solutions involving estates, trusts, business succession, asset protection, wealth transfer, tax planning and estate administration – all focused on helping you achieve your personal and financial goals. Our broad client base ranges from high net-worth individuals and families to corporate executives and owners of closely held businesses.

Our attorneys can help you use trusts and other devices both during your lifetime and at your death to transfer assets and minimize federal and state taxes. We have especially significant experience in helping families transfer business ownership and management from one generation to the next. That includes navigating the legal and tax implications, sustaining the viability of the business and preserving family harmony.

You'll find collaboration is our hallmark. To provide the best guidance, our team routinely works as a trusted partner to CPAs, investment advisors and other professionals.

Our Experience

- **Asset protection plans** to preserve and transfer wealth
- **Litigation** related to estates and trusts, including will caveats, spousal dissents and fiduciary proceedings
- **Protections for family members with special needs,** including guardianships, conservatorships, trusts and medical assistance under government benefit programs
- **Tax planning** involving various financial plans, insurance policies, investments, charitable giving and wealth transfer strategies
- **Trusts**, including living, testamentary, revocable, irrevocable, funded and unfunded
- **Wills**, powers of attorney and advance health directives
- **Succession plans and generational transfer of businesses** , including harmonious solutions to potentially complex interpersonal dynamics

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