TRUSTS + ESTATES

Ward and Smith, P.A.'s Trusts and Estates Practice Group provides estate planning, estate administration, and related services to individuals, charitable organizations, foundations, and corporate fiduciaries such as banks and trust companies. In addition to basic estate planning and administration, the Trusts and Estates Practice Group's representation of clients includes gift and estate tax planning, transition of family business planning, advice concerning the protection of family assets from exposure to future claims and liabilities (including divorce), strategies with retirement plans and IRAs, elder law planning, and many other estate planning-related areas.

Because estate planning and administration often implicate other practice areas, attorneys in the Trusts and Estates Practice Group work closely with other attorneys in the Firm. Our size and team approach allows the Group to draw on the experience of other practice groups, including:

- Family Law to handle cases such as equitable distribution and divorce and remarriage situations in which premarital and postmarital agreements and spousal trusts are desired;
- Real Estate for real property issues in planning and administering estates;
- Business for matters involving the formation, transfer, and valuation of business entities such as limited liability companies, limited partnerships, and corporations;
- Litigation to handle special proceedings before the clerk of court and trust and estate litigation in trial and appellate courts; and,
- Tax for assistance with complex income tax issues and the formation and administration of private foundations.

Beyond the many services provided by the Trusts and Estates Practice Group, our attorneys work to keep our clients informed about trust and estate issues. We regularly prepare articles and send out bulletins to clients throughout the year. Our attorneys also frequently speak on trust and estate issues at seminars.

Our Trusts and Estates attorneys are recognized by their peers as being among the very best. One of the attorneys within the Firm is a Fellow in The American College of Trust and Estate Counsel, the premier organization of estate planning and probate lawyers in the country, and six attorneys are certified by the North Carolina State Bar as Board Certified Specialists in Estate Planning and Probate Law. In addition, one attorney in this Practice Group is certified by the National Elder Law Foundation as a Certified Elder Law Attorney and is certified by the North Carolina State Bar as a Board Certified Specialist in Elder Law.