

## Estate & Succession Planning

### **PRACTICE CONTACTS**

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### **RELATED PRACTICES**

Estate & Trust Administration

Family Law

Personal Tax Services

Private Client Services

We appreciate the importance of listening to our clients and are dedicated to working with them to develop creative and desirable solutions for their current situation and long-term plans. Our lawyers are knowledgeable and experienced in the area of estate and succession planning and provide the following services:

- Assist clients in increasing, preserving and transferring wealth
- Plan for the orderly and efficient succession of family businesses
- Review and assess minimization of tax and other transfer costs
- Prepare traditional planning documents (will and trust agreements)
- Design and implement sophisticated strategies for the tax-efficient passage of wealth to individual and charitable beneficiaries
- Emphasize the utilization of non-probate transfer arrangements in order to provide the maximum benefits at the most reasonable costs to our clients, their families and other beneficiaries