

## Trusts & Estates

Our Trusts & Estates practice group focuses on accomplishing our clients' unique estate planning and business succession planning goals through the use of the most effective and tax-advantaged planning methods available. We service a wide range of clients, from many parts of the country, ranging from clients with moderate sized estates to high net worth families, executives of *Fortune* 500 companies, entertainers, and sports figures.

Our attorneys become trusted advisors to our clients in these areas. Because of our expertise and experience, our clients rely on us for vital and effective estate planning, business planning, tax advice, trust and estate administration and charitable planning. We provide on-going counseling and guidance to our clients, often working with multiple generations of the same family to optimize the planning results at all generation levels.

Our practice group has established the "family office" concept in which our highly-skilled legal assistants utilize our sophisticated computer systems to assist high net worth families in administering their estate plans and financial structures, maintaining their business entities, and assist them in the administration of their various types of irrevocable lifetime gifting trusts.

Our attorneys also advise donors regarding charitable giving strategies, including creating and operating public and private foundations, supporting organizations, and charitable trusts. Additionally, we counsel nonprofit and charitable organizations about tax and regulatory compliance and effective operation.

Our practice group regularly counsels family business owners with regard to business ownership and management succession planning issues, business exit strategies, buy-sell agreements, family dynamics issues, and structuring business entities for optimal protection from potential future liabilities.

By invitation of various professional conferences, our attorneys frequently speak on topics involving the benefits of life insurance in estate planning; charitable, tax, and business succession planning; and probate and trust issues. We have also authored numerous articles for national professional publications.

Our estate planning, trusts and estates attorneys are recognized for their significant expertise. A number of our attorneys have been elected as fellows of the American College of Trust and Estate Counsel. Fourteen have been recognized in *The Best Lawyers in America*.

### Expertise

Our services include:

- Comprehensive Tax and Estate Planning
- Will and Trust Planning and Drafting
- Closely Held Business Succession Planning and Exit Planning
- Estate, Gift, and Generation Skipping Transfer Tax Mitigation and Avoidance
- Sophisticated Life Insurance Planning
- Charitable Planning
- Generation Skipping Trust Planning
- Buy-Sell Agreements
- Trust and Estate Administration
- Family Office Services
- Gift and Estate Tax Return Preparation
- Trust Litigation and Trust Modification