taxation and estate planning & probate administration

TEAM LEADER
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Attorneys in the Taxation and Estate Planning & Probate Administration team are well versed in planning techniques that assist clients in helping clients form and implement estate plans that take into account tax issues, human factors and financial management issues.

Mitchell Williams' attorneys have experience working with individual and corporate clients on taxation issues such as:

- Buying and selling businesses in the most tax-efficient manner
- Forming corporations, general partnerships, limited partnerships and limited liability companies
- Buying and selling real estate, including tax-free exchanges
- Accomplishing corporate reorganizations and mergers on a tax-free basis
- Advising owners of family businesses on all types of tax and corporate issues
- Representing clients in federal and state tax controversies
- Advising insurance companies regarding the taxation of insurance products
- Advising employers and third-party administrators on all types of qualified and non-qualified retirement plans, and other employee benefit plans

Estate planning and probate experience includes:

- Minimizing or eliminating estate taxes to maximize wealth preservation
- Protecting family assets through utilization of multi-generational trusts and family investment entities
- Charitable tax planning to accomplish lifetime personal goals and testamentary charitable objectives
- Facilitating the transfer of family assets through efficient probate administration and probate avoidance techniques
- Providing for the ongoing care of minor children and disabled or incapacitated family members
- Planning for the continuation of family businesses and farms through lifetime and testamentary transfer techniques