

specialized wealth transfer

TEAM LEADER

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The Specialized Wealth Transfer Team handles estate planning, estate and trust administration and transactions involving the transfer of controlling or other significant interests in business entities. Our attorneys often represent executives and principals of closely held businesses in personal, family tax and financial planning matters.

We create, plan and implement comprehensive estate plans for United States and foreign individuals and families, consisting of wills and all types of trusts, including revocable inter-vivos trusts, charitable trusts, irrevocable life insurance trusts, minority trusts, qualified personal residence trusts, installment sales to grantor trusts, generation-skipping trusts, private foundations, family limited partnerships, durable powers of attorney and health care proxies. Components often include life insurance planning and inter-vivos wealth transfer programs within the family.

As part of integrated planning for owners of closely held corporations and partnership interests, our team also advises clients on entity structuring, management and equity succession techniques, valuations, tax and legal aspects of business and investment planning. Finally, we offer clients cost-effective strategies for the protection of their assets, and enable our clients to better manage future risks against lawsuits and to mitigate present and future income and estate tax liabilities.