

## RELATED SERVICES

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- Family Law
- Succession Planning for Business Owners

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## Wealth Transfer Planning

We consider a number of wealth transfer planning tools and concepts when counseling and advising our high net worth clients. We help clients select the form of trust, transfer or business entity that best serves the intended purpose in each individual or family circumstance, including:

- Irrevocable Trusts
- Qualified Personal Residence Trusts
- Charitable Trusts
- Grantor Retained Annuity Trusts
- Intentionally Defective Trusts
- Promissory Notes
- Generation Skipping Transfers
- Family Partnerships/LLCs

Many of our attorneys have advanced legal tax degrees and generations of trust experience which help us guide strategic decisions, maximize tax advantages and protect the wealth of our clients. Our tax accountants and CPAs provide efficient, single-source, single-bill service, including tax return filings which save clients time, money and headaches.