

Trust & Estate Planning

A plan you can trust—the foundation of our estate planning and asset preservation practice.

Life can be unpredictable. Rather than allow changes to personal and business assets, family relationships, or health to take you by surprise, we work closely with you to design and implement strategies to address those contingencies while protecting and growing your wealth.

Trust and estate planning is a lifelong process that prepares you to address the inevitable changes in your life. Our attorneys provide integrated estate planning and wealth preservation solutions to businesses and business owners that align with the following goals:

- Business succession
- Asset protection
- Income and estate tax planning
- Organization and orderly disposition of business and personal assets
- Maintaining privacy and avoiding probate

These comprehensive estate planning, asset protection, and wealth preservation plans include:

- Revocable and irrevocable trusts
- Business succession plans
 - Ownership and management continuity plans
 - Shareholder buy-sell agreements
- Wills
- Private annuities
- Retirement plans
- Pre- and post-marital agreements
- Advance directives and HIPAA release agreements
- General durable and health care powers of attorney
- Gift and charitable planning
- Private foundations and not-for-profit entities
- Family office, partnership, and limited liability company formation

Tax strategies are critical elements of asset protection and wealth transfer, both during your lifetime and after your death. Our lawyers closely monitor and forecast changes in federal tax laws and regulations. We help clients reduce or defer their tax exposure by designing personal, estate, and gift tax strategies and

assist in preparing tax filings and opinions, concerning:

- Estate freeze strategies
- Equity-based and deferred compensation planning
- Valuation discounts
- Multi-state asset ownership
- International and cross-border ownership
- Expatriate tax counseling and offshore planning
- Tax compliance issues

Once strategies are implemented, we continue to service clients through trust administration and probate proceedings. Even with comprehensive planning, however, disagreements and disputes can occur. We represent grantors, trustees, personal representatives, and beneficiaries in litigation and alternative dispute resolution forums over:

- Will and trust contents
- Contested estates
- Guardianships and conservatorships
- Tax audits and controversies

Effective estate, asset, and tax planning is a team effort, not only involving other Howard & Howard attorneys, but also the client's other professional advisors. Our trust and estate planning attorneys regularly collaborate with accountants, financial managers, appraisers, bankers, realtors, and insurance representatives to achieve the client's current and evolving goals and objectives.

When life takes an unexpected turn, let us help safeguard your assets and protect those close to you.