



Practice Groups – Estate Planning and Probate Administration

The personal and professional mission of the estate planning attorneys is to provide the highest quality of service while developing and maintaining close relationships with our clients. Our approach to estate planning is to evaluate the needs, personal goals and financial situations of our clients and to provide a custom-tailored plan for each client. We are proud of our ability to do this by creating an environment which fosters communication on sensitive personal matters, such as meeting clients in their homes. We have considerable experience in providing complex estate planning advice designed to preserve a client's assets and attain their personal family goals while minimizing the income, gift, estate and generation-skipping taxes associated with the lifetime and/or testamentary transfer of wealth. We utilize traditional as well as innovative techniques to meet a client's goals.

We represent clients with estates ranging in size from less than \$100,000 to more than \$70 million, and often represent several generations within a family. We advise many business owners in connection with business succession planning and physicians and other professionals in connection with asset protection planning.

We receive repeated client referrals from attorneys at other law firms, accountants, investment advisors and other financial planning professionals, as well as from our existing clients, which confirms the confidence of other professionals in our abilities. Our relationship with clients over several decades is evidence of the extraordinary level of service we consistently deliver.

In most cases, we are able to offer our services on a fixed fee basis, so that our clients do not feel constrained from exploring fully their estate planning needs and goals.

CONTACT US

For further information or specific questions, please feel free to contact any one of our practice group members:

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