

A banner image showing a close-up of an antique map with a compass rose and a quill pen resting on it. The map has some handwritten text, including 'B I D' and 'S'.

Estate Planning

We are committed to helping families and individuals meet their personal estate planning goals, and counseling clients on techniques to transfer assets to their loved ones.

Our attorneys practicing estate planning are especially known for their depth of experience regarding:

- Florida probate
- Florida wills
- Estate planning

The first step involves communication and education. Our attorneys meet personally with clients to review their personal and financial information as well as their goals and objectives for their family members.

In addition to learning about our clients and their goals, we educate them about issues affecting wealth transfer such as:

- Wills and trusts
- Probate and trust administration
- Alternatives to estate administration
- Estate, gift and generation-skipping taxes, and asset protection

We believe that an informed client will make the best possible decisions for their family. We also believe that estate planning is a lifelong process. The estate plan of a young executive or business person changes over time, as their family, assets and objectives change.

Because we attempt to customize our clients' estate plan to their particular needs, the complexity of the plan selected will vary from simple to complicated as directed by the client. We provide standard estate planning documents consisting of Wills, Durable Powers of Attorney, Designation of Health Care Surrogate, and Life Support Declaration (living wills), for married couples with children, as well as for single persons.

In cases where estate tax planning is warranted, the firm's attorneys prepare documents that take advantage of the applicable credit amount (commonly known as the unified credit). We also counsel clients to consider marital deduction trusts and generation-skipping trusts. Because the nature of the estate and gift transfer tax system encourages gifts, we

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Related Professionals

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Related Expertise

[Estate & Trust Administration](#)

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[Wealth Planning](#)

[Wills & Trusts](#)

prepare a variety of irrevocable trusts that can serve as vehicles for making lifetime gifts to family members, thereby reducing the effective rate of transfer tax.

Our attorneys have experience dealing with the variety of financial assets that typically constitute a client's portfolio, including real estate, marketable securities, qualified plan accounts and individual retirement arrangements. Moreover, we have had significant experience in preparing comprehensive estate plans that utilize all of the client's assets in a complete transfer program to take advantage of all available estate tax exclusions, exemptions and deductions.

Clients benefit from our experience in preparing charitable remainder trusts, charitable gift annuities, private family foundations and other arrangements that reduce estate tax by utilizing charitable deductions available to estate and gift tax transfers.

Based on the recent reduction in the capital gains tax rate, the transfer of family-owned assets by various sale techniques, rather than by gift or transfer at death has become more attractive. For this reason, we may recommend intra-family sales in the form of deferred payment sales, private annuities and self-canceling installment notes.

News

Lowndes Welcomes New Associate Gerardo Ortega
09.18.2023 | PRESS RELEASE

Julia Frey, Norma Stanley Recognized in 2022 Best Lawyers: Family Law Publication
12.20.2021 | AWARDS & RECOGNITION

Melody Lynch Named Vice-Chair of the ABA Real Property, Trust and Estate Law Section's Ethics and Malpractice Committee
09.01.2021 | PRESS RELEASE

Lowndes Welcomes New Associate Alyson Hoffman
11.23.2020 | FIRM NEWS

Publications

Three Documents You Must Have to Protect Your Family During the COVID-19 Crisis and Beyond
06.08.2020 | ARTICLE