Wealth Planning

We provide effective and creative personal, financial, charitable, and tax planning to individual clients and closely-held family businesses.

Our attorneys offer a broad range of planning services, with the goal of the preservation of wealth and the minimization of wealth transfer and income taxation. This planning process typically involves an analysis of the income tax, gift tax, and estate tax consequences of transfers.

We have decades of experience designing effective plans and drafting the appropriate corresponding estate planning documents. Each client's situation is unique, and tax decisions must be consistent with the client's long-term goals.

Our goal is to create a comprehensive estate plans that takes into account estate and income tax issues, as well as family issues and financial factors. We tailor each plan to the needs of the individual client.

We assist clients with a wide range of services from traditional wills and trusts for taxable and non-taxable estates to more complex planning. We frequently help with the formation and implementation of business succession plans, family entities, charitable trusts, irrevocable insurance trusts and private foundations.

We are also experienced in various post-mortem tax planning techniques.

Key Contacts

Julia L. Frey

Norma Stanley

Related Professionals

Julia L. Frey

Matthew R. O'Kane

Norma Stanley

Related Expertise

Estate & Trust Administration

Estate Planning

Private Wealth

Probate & Estate Litigation

Wills & Trusts