

Estate Planning, Wills, and Trusts

The Firm provides estate planning for people with all kinds of circumstances and requirements. A few of The Firm's most important goals in estate planning are:

- Assuring, regardless of the plan that the client selects, the client and his or her spouse retain sufficient assets to provide for their lives and support.
- Ensuring that the assets go to the people the client wanted them to go to on death.
- Providing guardianship for minors or mentally disabled people on the client's death.
- Preserving funds that will be left to minor children by establishing appropriate trust instruments, to be paid out for support, educational, or other purposes, in accord with the client's wishes.
- Selecting the right people or institutions to act in a fiduciary capacity, whether as personal representatives, trustees, guardians, conservators, or agents under a power of attorney.
- Minimizing estate, generation skipping, and income taxes.
- Making the administration of an estate or trust as convenient as possible and avoidance of ancillary probate if more than one state is involved.
- Providing for charitable tax savings and financially advantageous gifts of conservation easements.

To accomplish these ends, The Firm commonly uses any single or combination of the following modalities:

Joint tenancy; powers of attorney; simple and complex wills, wills with trusts, wills which pour assets into an existing trust, living wills; gifts to intended heirs, gifts to minors; revocable or living trusts, irrevocable trusts, residence trusts, generation skipping trusts, Totten trusts, life insurance trusts, other more exotic trusts; family partnerships, family limited partnerships, family corporations, family limited liability companies; conservatorships and guardianship.