CH&

Trusts, Estate Planning & Succession

The attorneys working in the Trusts, Estate Planning & Succession team use creative and personalized planning techniques to provide solutions to one of the most important problems facing today's families: the accumulation, preservation and transfer of their wealth. Complex wealth transfer, including valuation discounting, family business succession and estate tax planning advice is subject to an ever-changing set of federal and state regulation. We're here to help ensure your assets are protected and directed as you wish.

Areas of Emphasis

- Revocable and irrevocable trust agreements
- LLC and limited partnership agreements
- Durable powers of attorney
- Health care directives
- Beneficiary designations for pension, profit-sharing and IRA accounts
- Dynastic, charitable, "intentionally defective" and other kinds of trusts
- Intra-family sales, using creative terms and security devices
- Asset protection strategies
- Business succession strategies
- Charitable foundations and other philanthropic strategies
- Valuation planning

Representative Matters

Attorneys in the Trusts, Estate Planning & Succession group have represented clients in the following transactions:

- Developed a multigenerational family education trust to supplement education funding for future generations.
- Developed corporate reorganization strategies for a closely-held business for the purpose of minimizing the taxable value of its shares.

- Developed and implemented a multi-year business succession plan to transfer a multimillion-dollar business to younger generations.
- Negotiated with the IRS for a substantial discount applied to a family partnership.
- Assisted a client with the evaluation of a variety of philanthropic strategies, leading to the implementation of a family foundation.

In addition to transactions such as those described above, we routinely prepare wills, trusts, powers of attorney, community property agreements, health care directives, and similar documents for our clients.

*Due to the sensitive nature of our Estate Planning practice, we do not include client names in the above-referenced list of experiences.