



Estate Planning & Trusts

We assist clients in the design and preparation of wills, living trusts with tax provisions, life insurance trusts, living wills and powers of attorney. We work with families in business succession planning and buy-sell agreements, as well as provide tax advice as to gift, estate, and GST tax savings utilizing use of Grantor Returned Annuity Trusts, sales to Defective Grantor Trusts and Qualified Personal Residence trusts. Further, we offer advice on using valuation discounts, charitable trusts and planned giving using private foundations and donor advised funds with Community Foundations, as well as assist with gift and estate tax returns, IRS disputes, and handle probates whether routine or contested.