Planning

Attorneys

- Debra L. Boje
- Tami F. Conetta
- Leticia Hernandez
- Carolyn M. Kershner
- Brent D. Klein
- David P. Kron
- Kristen M. Lynch
- Carl Schuster
- Harry B. Smith
- Barry F. Spivey
- Glen A. Stankee
- Ana M. Veliz

We counsel clients in techniques for conserving, managing and transferring wealth, and minimizing income, gift, estate and generation-skipping transfer taxes, whenever possible. This includes transferring all types of property interests, including sole and family proprietorships, closely-held corporations, real estate, partnerships, intellectual property rights, employee benefits and other investments.

Many of the Firm's clients include charities as an integral part of their income, gift and estate tax planning. Our attorneys assist them in planning and establishing foundations and charitable trusts (both charitable lead trusts and charitable remainder trusts). We also represent charitable organizations in connection with the receipt of gifts and bequests, as well as in their administrative affairs, including issues regarding formation.

Planning for the entire family is a growing concern of many clients. We advise clients on the use of multi-generational, spendthrift trusts and other vehicles to protect assets. In addition, we also negotiate and draft ante-nuptial and post-nuptial agreements, as well as assist in planning for property division incidental to divorce.