Family Wealth Planning

We guide families and fiduciaries through life's most important financial decisions, protecting wealth while positioning it to serve future generations.

Trusted Advisors for Families and Fiduciaries

Our team advises on all aspects of family wealth planning, including estate and gift strategies, trust and estate administration, business succession and charitable giving. We work with executives of public companies, owners of closely held and start-up businesses, multigenerational families, trustees, private foundations, charitable organizations and other clients navigating complex wealth planning decisions. These matters often involve complex assets, sensitive relationships or international considerations that require coordination across legal and financial teams.

Clients turn to us when decisions are nuanced and the details matter. We start by understanding each client's goals, identifying risks early and shaping strategies that reflect their current and future needs and priorities. Every plan is tailored to the people, assets and relationships involved and designed to stand up to the test of time.

We often advise clients through major life events that call for strategic, forward-looking planning, such as starting a business, growing and caring for a family, supporting cherished causes, or preparing for a transition.

Our Services

- Trust and estate planning, including wills, trusts and wealth transfer structures, planning for special needs beneficiaries and generational incentive trusts

RELATED ATTORNEYS

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- Generation-skipping and dynasty trust planning for multigenerational wealth
- Executive planning, including non-qualified compensation and retirement benefits
- Community property planning, including premarital, post-nuptial and cohabitation agreements
- Trust and estate administration, including fiduciary guidance, compliance and conflict resolution
- Charitable planning strategies and nonprofit counsel, including donor-advised funds, private foundations and formation of tax-exempt organizations, with an emphasis on educating and involving the next generation
- Business succession planning for family-owned and closely held companies
- Cross-border planning for clients with international assets or beneficiaries
- Trust and estate litigation support, including coordination with fiduciary litigators on disputes involving trusts, estates and beneficiaries
- Use of advanced structures such as GRATs, family investment companies and grantor trusts when appropriate

Full-Service Counsel

When needed, we work closely with colleagues in our Corporate, Tax, and Fiduciary Duty, Shareholder & Partnership Disputes groups to address overlapping issues, such as business ownership, fiduciary obligations or trust litigation. This access and collaboration help clients avoid costly missteps and ensure our advice considers both legal and practical considerations. The result is advice clients can use to solve immediate issues and plan effectively for the future.

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