CALFEE

Estate and Succession Planning

The attorneys in Calfee's Estate and Succession Planning group help people make some of the most important decisions of their lives. From the owner of a family business struggling with corporate succession issues, to a CEO planning for retirement, to a young couple handling their sometimes competing responsibilities for children and parents, we assist our clients in developing and implementing comprehensive estate plans that carefully balance personal goals with tax and administrative concerns. We also provide comprehensive probate and trust administration, litigation services and asset protection planning counsel.

Our representation always begins with a thorough analysis of your unique needs and goals. Innovative and sophisticated techniques ensure that the needs and goals are achieved in a way that makes personal and economic sense. We design estate plans that achieve maximum tax reduction, but recognize that it is only one of many considerations. The key is striking an appropriate balance. It is always our goal to help articulate and achieve what is most important to our clients.

Representative Experience

Personal Estate Planning

- Wills and living trusts
- Probate avoidance
- Powers of attorney (financial and health care)
- Irrevocable insurance trusts
- Minors' education trusts
- Generation-skipping trusts
- Grantor retained interest trusts
- Lifetime gifts
- Asset protection planning
- Domicile planning
- Guardianship matters

Charitable Planning

- Charitable lead and remainder trusts
- Gift annuities
- Private foundations
- Pooled income funds

Corporate Succession Planning

- Ownership control and management of closely held businesses
- Analysis/implementation of gift or sale of closely held stock
- Family limited partnerships/limited liability companies
- Subchapter S trusts

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Estate and Trust Administration

- Post-mortem income and estate tax planning
- Probate court filings
- Estate tax return preparation
- Estate accounting and bookkeeping
- Fiduciary income tax returns
- Asset transfers

Probate Litigation

- Individual and corporate fiduciaries
- Beneficiaries