

Estate and Gift Planning

The broad experience of our Wealth Planning, Trusts, and Estates attorneys allows us to provide integrated and comprehensive business succession, wealth transfer, estate planning, and estate administration, utilizing our knowledge in business, trust and estate, and tax law.

We assist families in developing estate plans that protect assets and ensure their orderly distribution in accordance with our clients' objectives while minimizing tax consequences. We advise individuals and families concerning estate and gift tax planning, the protection and transfer of wealth during life and at death, and the management and preservation of assets upon incapacity. We do not believe that one plan fits everyone's needs, and instead structure custom estate plans to take into account each client's individual needs and objectives. We collaborate with the client's existing team of other professionals, including accountants, life insurance representatives, financial planners, and investment advisers to achieve the client's objectives.

We assist clients with taxable estates in lifetime wealth planning through the use of trusts, family limited partnerships, and other tax-favored means. Estate planning tools such as durable powers of attorney, revocable trusts, prenuptial and post-marital agreements, and supplemental needs trusts for Medicaid qualification assist our clients in maintaining family assets and business operations. We assist clients with their philanthropic objectives through the use of endowments, charitable trusts, private foundations, donor-advised funds, public charities, and conservation easements. Our clients are business owners, real estate developers, ranchers, oil and gas business owners, C-level executives, and retirees.