Lowndes

Services & Industries

Wealth Planning

We provide effective and creative personal, financial, charitable, and tax planning to individual clients and closely-held family businesses.

We provide clients with a broad range of planning services, with the goal of the preservation of wealth and the minimization of wealth transfer and income taxation. This planning process typically involves an analysis of the income tax, gift tax, and estate tax consequences of transfers.

Our attorneys have decades of experience designing effective plans and drafting the appropriate corresponding estate planning documents. Each client´s situation is unique, and tax decisions must be consistent with the client´s long-term goals. Taking into account estate and income tax issues, as well as family issues and financial factors, our goal is to create comprehensive estate plans to address all of these issues, while tailoring each plan to the needs of the individual client.

Our range of services includes traditional wills and trusts for taxable and non-taxable estates to more complex planning, including the formation and implementation of business succession plans, family entities, charitable trusts, irrevocable insurance trusts and private foundations. We are also experienced in various post-mortem tax planning techniques.

Related Practice Areas

- Charitable Planning
- Estate & Probate Litigation
- Estate & Trust Administration
- Estate Planning
- Guardianship
- Private Wealth Services
- Wills & Trusts

Key Contact

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