Lowndes

Services & Industries

Wills & Trusts

Our estate planning services are designed to provide our clients with a high level of certainty about their future. We advise clients in all aspects of estate planning from the most basic to the most complex estate plans.

We work with our clients to identify their overall goals and find a tax-efficient way to achieve them. We provide guidance on the tools available, including revocable trusts and wills, durable powers of attorney, health care powers of attorney and living wills, life insurance trusts, charitable trusts, planning for qualified plan and IRA assets, and minors´ trusts. Our firsthand experience with estate and gift tax laws enables us to handle preparation of the necessary legal documents.

Since coordination between advisors provides the most effective solutions for addressing the client´s goals, we are always willing to meet with investment planners, accountants and other advisors on behalf of our clients to ensure all aspects of the client´s life are included in their estate plan.

Related Practice Areas

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

Key Contact

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