WILLS & TRUSTS

We advise our clients in all aspects of estate planning from the most basic to the most complex estate plans, 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. We first help our clients identify their overall goals and then we find a tax-efficient way to achieve those goals. Once those goals have been established, we prepare the estate planning documents necessary to achieve those goals. We have firsthand experience with estate and gift tax laws which enables us to draft effective legal documents. The implementation of our estate planning services is designed to provide our clients with a high level of certainty about their future. We believe that the 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.