Estate and Trust Planning

The Estate and Trust Planning group at Trenam is an interdisciplinary team providing estate, tax, and wealth-transfer planning services for high-net-worth individuals, closely held and family businesses, family offices and charitable organizations. We are committed to providing our clients with excellent, responsive and discreet services in these important and highly personal matters.

Protecting and Preserving Family Wealth

The attorneys in our Estate and Trust Planning group work closely with our clients to develop strategies and plans intended to protect and preserve family wealth. Each customized plan takes into consideration the business impacts, tax liabilities and personal risks of the client.

Trust and Estate Planning and Administration

We assist clients in all areas of trust and estate-related matters. Our team of experienced estate planning lawyers and professionals is uniquely equipped to advise clients on a variety of issues, including:

- Developing and implementing estate plans for multiple generations
- Developing and implementing strategies for transferring wealth on a tax-efficient basis
- Designing ownership structures to achieve operational control, tax and liability protection objectives through the use and administration of closely-held corporations, limited liability companies and partnerships
- Estate and trust administration and settlement
- Tax, probate and trust disputes and litigation
- Advising families on business succession issues
- Creating charitable foundations and trusts and working with clients to achieve their charitable intent

Tax Advisors and Counseling

Trenam's tax lawyers provide high-quality, comprehensive and creative tax-related advice to achieve tax efficient, predictable and carefully crafted results for the firm's clients. In addition to counseling and guiding individuals, businesses and non-profit and tax-exempt organizations in all phases of tax planning, compliance and controversy, Trenam's tax lawyers also have become a trusted, “go to” source of co-counsel assistance for boutique and smaller law firms that do not have tax attorneys on staff.

Family Office Services

Trenam's Estate and Trust Planning group provides comprehensive guidance to high net worth families (and the businesses they may own) by creating and managing family offices. Using a multi-disciplinary approach that leverages the skills of attorneys from several practice groups across the firm, we provide integrated services that align the financial interests of the family with the commercial needs and interests of the business. We provide advice on the creation of a family council or family constitution, to enhance communication and cooperation among family members and assists in resolving disputes and reducing conflicts and tensions that may arise, simplifying the management of the family's assets. By working together with other professionals (for example, accountants, financial advisors, investment brokers) on behalf of our clients, we provide counsel and advice about pooled investment structures, creation of private trust structures and the establishment of family foundations to accomplish business, investment and philanthropic objectives.

Please click here to view news and publications related to our Estate and Trust Planning Group.