

Advanced Estate & Tax Planning

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Our attorneys advise high-net-worth individuals and families on sophisticated estate planning strategies designed to reduce taxable estates and maximize wealth transfer efficiency. We tailor each plan to reflect a client's financial profile, family structure, and long-term objectives—always staying ahead of changing tax laws and leveraging every available planning opportunity.

Our services include:

- **Tax Credit Shelter Trusts**

Utilizing unified credit (estate tax exemption) through bypass trusts and other structures to preserve tax-advantaged wealth transfer.

- **Marital Deduction Planning**

Leveraging the unlimited marital deduction through properly structured trusts (e.g., QTIP trusts) to defer estate tax and provide spousal support.

- **Generation-Skipping Transfer (GST) Tax Planning**

Implementing trusts that span multiple generations to reduce cumulative taxation and preserve family wealth over the long term.

- **Lifetime Gifting Strategies**

Designing annual exclusion gifting programs, grantor-retained interest trusts (GRATs), and intra-family loans to reduce the taxable estate during life.

- **Valuation Discount Planning**

Applying strategic ownership structures such as family limited partnerships (FLPs) to reduce gift and estate tax valuations while maintaining control and income flow.

- **Charitable Planning**

Structuring charitable lead and remainder trusts (CLATs and CRATs), private foundations, and donor-advised funds to align philanthropy with estate tax reduction.

Our team partners with financial advisors, accountants, and family offices to ensure every estate plan integrates seamlessly into a client's overall financial and tax planning strategy.

New York: Albany, Buffalo, Clarence, Long Island, New York City, Rochester, Saratoga Springs, Syracuse // **Florida:** Jacksonville, West Palm Beach
Illinois: Chicago // **Ohio:** Cleveland // **Oklahoma:** Oklahoma City // **Ontario:** Greater Toronto Area // **Texas:** San Antonio // **Washington, D.C**

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