Private Wealth Management

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Our Private Wealth Mangement Team provides proactive, multi-disciplinary counsel for high-net-worth individuals, entrepreneurs, and family offices. We coordinate with your advisory team to deliver integrated strategies that safeguard and grow your wealth across generations.

Our services include:

- **Estate & Gift Tax Planning**
  Minimizing estate, gift, and GST taxes through lifetime transfers, trusts, and charitable vehicles.
- **Business Succession Planning**
  Structuring tax-efficient plans that allow family businesses and closely held companies to transition smoothly across generations or prepare for liquidity events. Our attorneys work closely with clients to preserve their legacy and ensure operational continuity.
- **Complex Trust Structuring**
  Implementing GRATs, SLATs, IDGTs, BDITs, and other sophisticated trusts to achieve estate, asset protection, and income tax goals.
- **Prenuptial & Postnuptial Planning**
  Crafting marital agreements that preserve personal and family assets while aligning with broader estate plans.
- **Residency & Tax Domicile Transitions**
  Guiding clients through legal and tax strategies to establish domicile in favorable jurisdictions (e.g., NY to FL).
- **Multi-Generational Wealth Planning**
  Supporting family governance, stewardship, and long-term wealth transfer through custom legacy strategies.
- **Cross-Border Planning**
  Navigating international tax and succession complexities for globally connected families and beneficiaries.
- **Philanthropic Planning**
  Advising on private foundations, charitable trusts, and donor-advised funds to advance philanthropic missions.

- **Family Office Structuring & Advisory**
  Establishing and advising family offices on legal, tax, and operational best practices.

- **Risk Management & Asset Protection**
  Structuring ownership and trust arrangements to shield assets from future liabilities and disputes.