



Trusts & Estates

At Lippes Mathias, our Trusts & Estates group of creative planners and tax advisors will ensure your estate plan meets your goals. Our attorneys can help you with everything from drafting a straightforward power of attorney to meeting with you and your financial team to develop an aggressive, tailored tax planning strategy. We utilize the best techniques available to ensure that your estate plan will withstand the test of time.

Lippes Mathias provides counsel on all aspects of estate and succession planning. From taking advantage of tax laws to asset management, our planning services provide you with a well-crafted strategy to achieve your personal and family goals.

We carefully guide clients through difficult guardianship matters involving court-appointed fiduciaries making medical and financial decisions on behalf of incapacitated individuals, as well as advising such Ward clients through statutory reporting requirements in protection against fraud or undue influence.

Our expertise helps you preserve a lifetime of hard work, by protecting, strengthening, and transferring assets from one generation to the next.

We will also assist you in understanding your needs and objectives to tailor a plan that fits your individual situation with enough flexibility to withstand the changing tax and economic environment.

TEAM LEADER



DAVID E. SIEGFELD
Partner | Team Leader - Trusts & Estates

FOCUS AREAS

Advance Directives	Generational Wealth Transfers	Wills & Probate
Estates & Tax Planning	Guardianship & Conservatorship	
Estate & Trust Administration	Surrogate's Court Practice	