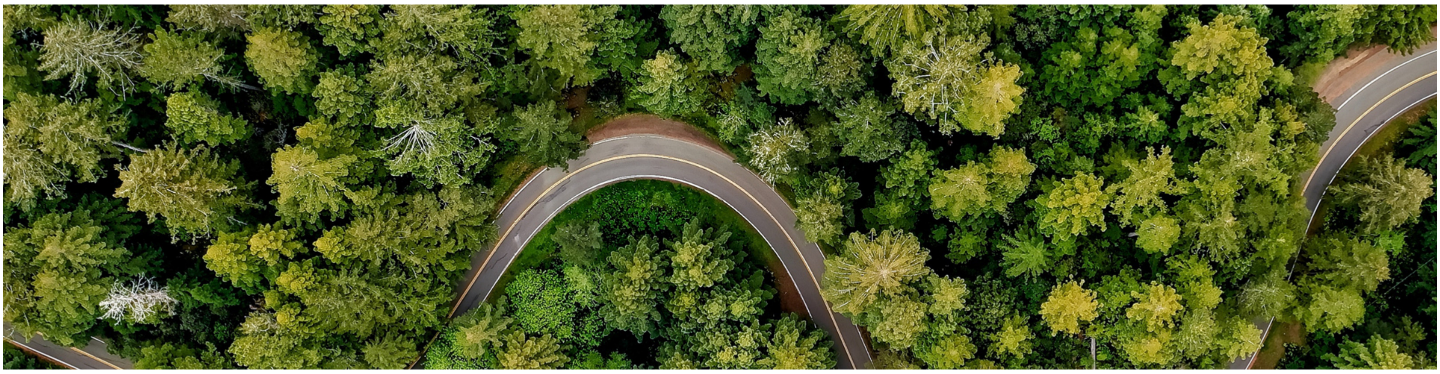

Trusts & Estates

The Trusts & Estates practice team at Lippes Mathias provides comprehensive and sophisticated counsel to individuals, families, and business owners on the preservation, protection, and transfer of wealth in alignment with their long-term objectives and core values.

Our attorneys advise clients on the full range of estate and trust planning, from foundational wills and revocable trusts to complex multigenerational wealth transfer structures. We leverage advanced strategies, including grantor trusts, charitable planning vehicles, and dynasty trusts, to minimize transfer taxes while promoting long-term stewardship of family wealth to achieve long-term financial and philanthropic goals.

TEAM LEADER

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

In addition to strategic planning, we regularly assist clients in trust and estate administration, contested probate court proceedings, and guardianship matters. Our attorneys work closely with fiduciaries to ensure the diligent and prudent execution of their duties, while mitigating the risk of conflict and litigation.

Collaboration and flexibility are central to our approach. We regularly coordinate with clients' existing legal, financial, and tax advisors to build cohesive and forward-looking plans capable of withstanding evolving tax laws, changing family circumstances, and shifting economic conditions.

At Lippes Mathias, we understand that exceptional wealth requires exceptional planning. Our team delivers the discretion, technical fluency, and strategic insight that sophisticated clients expect when entrusting their legacies to experienced counsel.

Our various practice areas include:

- **Basic Estate Planning** We help individuals and families establish foundational estate planning documents to protect their wishes, loved ones, and assets. Our attorneys work closely with clients to ensure that plans are clear, legally sound, and tailored to personal and family needs.
- **Advanced Estate & Tax Planning** 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.

- **Trust & Estate Administration** We provide comprehensive representation for executors, trustees, and beneficiaries throughout the estate and trust administration process. Our attorneys offer strategic guidance in navigating the complex legal, financial, and administrative responsibilities associated with administering estates and trusts, ensuring compliance with applicable laws, and resolving disputes when necessary.

- **Elder Law** We assist individuals and families in preparing for the challenges that come with aging, illness, and diminished capacity. Our attorneys provide comprehensive legal guidance to protect autonomy, ensure appropriate care, and preserve assets for future needs or legacy goals.

- **Private Wealth Management** Our Private Wealth Management 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.

FOCUS AREAS

Advanced Estate & Tax Planning

Asset Protection Planning

Basic Estate Planning

Business Succession Planning

Charitable Giving

Cross-Border Estate & Tax Planning

Elder Law

Guardianship

Private Wealth Management

Probate & Trust Litigation

Residency Planning

Trust & Estate Administration