

Estate Planning

Plunkett Cooney's trusts and estates attorneys assist clients in developing estate plans that typically focus on complex estate, gift, income, and generation-skipping tax issues. They customize planning strategies to address their clients' specific needs and goals.

Firm members are regularly involved in complex estate and tax planning matters that require the use of techniques such as charitable trusts, grantor retained income trusts and unitrusts, irrevocable insurance trusts, dynasty trusts, and family limited partnerships.

Our attorneys work closely with other family advisors, including accountants, bankers, trust officers, financial and wealth planners, to ensure our clients' advisors coordinate planning to achieve our clients' goals. They listen to their clients to understand who their beneficiaries are and what their desires are regarding how property should pass to their beneficiaries during life and at death. They also help individuals provide for the special needs of family members, as well as make appropriate decisions relating to premarital agreements and marital dissolution planning.

Plunkett Cooney's estate planning attorneys have handled estate and tax planning matters involving diverse types of assets. They frequently encounter estates with closely held business interests or commercial real estate holdings, and they have broad experience in developing succession planning for these types of assets. In addition, our attorneys deal with other assets that present unique planning issues, such as artwork, antiques and collectibles, intellectual property, farms and timberland, horses, and employee benefits.

The planning they do for their clients is, in some cases, implemented during their lifetimes and, in other cases, upon their deaths. In the area of lifetime planning techniques, our attorneys have broad experience with preparing and filing tax returns, including asset valuation issues and audits.

Our experienced estate planning lawyers assist our business clients in planning and executing transfers of ownership and control of their enterprises and holdings. Our attorneys regularly employ strategies such as restrictive shareholder and partnership agreements, reorganization of corporations, and formation of limited liability companies (LLCs).