

## Wills, Trusts & Estate Planning

McDowell Rice's attorneys have the experience and expertise to handle a broad range of estate planning needs from creating a simple will to representing clients in complex trust litigation, regardless of the size of the estate. Our attorneys recognize that every estate plan needs to reflect the client's unique circumstances.

Good estate planning helps to preserve assets, reduce taxes and simplify the orderly transfer of property. We provide cost-effective, practical solutions for our clients' needs. Our attorneys work with clients to create estate plans and to update existing plans as clients' needs, statutes and tax regulations change.

When disputes over assets and related matters arise, McDowell Rice attorneys can navigate the complicated waters of probate and trust litigation while recognizing that such disputes are often emotionally difficult for our clients.

### **Our experience includes:**

- Personal Estate planning, including the preparation of Wills, Trusts and other estate planning documents
- Estate and Trust administration
- Will and Trust contests and related litigation
- Business Succession planning and exit strategies
- Lifetime giving and gift tax planning
- Charitable giving
- Life insurance planning, including Irrevocable Life Insurance Trusts ("ILIT's")
- Other specific types of irrevocable trusts, including Spousal Lifetime Access Trusts ("SLAT's") and Intentionally Defective Grantor Trusts ("IDGT's")
- Judicial and non-judicial modifications and terminations of irrevocable trusts
- Guardianships, contested and uncontested

- Preparation of Federal and State estate tax returns
- Internal Revenue Service audits

#### **Chairs**

Ronald S. Bronstein

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#### **Members of Practice Group**

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