ESTATE, PHILANTHROPY AND LEGACY

THE OTHER
FAMILY OFFICE

Expert advice to guide and protect your family's path.

ESTATE PLAN REVIEW

Detailed review of your existing Estate Planning documents:

- Review existing documents
- Illustrate key points of your Estate Plan in a flowchart and summary
- Ownership, trustee/executor, and beneficiary review
- Estate and gift tax calculations

ESTATE DOCUMENT DRAFTING

Prepare and/or refresh, then execute your baseline
Estate Planning documents:

- Wills
- Revocable Trusts
- Irrevocable Life Insurance Trust
- Powers of Attorney
- Living will and Advance Medical Directives

TRUST AND ESTATE PLANNING

Coordinated support from Legal, Planning, Tax and your Family Coach to best position you for:

- Life changing events, such as business transactions, inheritance, birth of children/grandchildren, marriage, divorce or death
- Wealth transfer, charitable planning, and legacy planning
- Potential tax minimization of strategies
- Estate Gift and Generation Skipping Transfer ("GST") tax planning

Review and evaluate your business transactional documents, including:

- Business formation, business sale, investment documents
- Transaction structuring and advisory

SPECIALIZED CONSULTING

Legal consulting for special circumstances

- Special Needs Trust planning for family members with physical, developmental, behavioral/emotional or sensory impairment disorders
- Consulting for same-sex or unmarried couples