NEXSEN | PRUET

Estate Planning and Wealth Transfer Planning

Professionals

John F. McLeod IV

Robert D. Lyerly Jr.

William M. Wilcox IV

Joel Stoudenmire

Fred L. Kingsmore Jr.

Our high net worth clients often have unique needs, goals and concerns. With six decades of experience serving individuals and families with estate and wealth transfer planning, we can be your trusted advisor.

Our team's comprehensive client services include:

- Customizing estate plans to the individual needs of clients and their family members across generations
- Determining the best options for transferring wealth on a tax-efficient basis
- Helping clients maneuver the complex issues associated with succession planning for family businesses
- Advising clients on the formation and operation of private family foundations
- Assisting clients in developing asset-protection strategies
- Preparing pre-nuptial and post-nuptial agreements and providing related business and tax advice

From simple to complex

Our skilled attorneys can help with issues ranging from drafting simple wills to arranging complex trusts. We provide counsel on gift and estate tax savings and all aspects of the administration of estates and trusts.

Trusts typically prepared include:

- Revocable Living Trusts
- ILITs (Irrevocable Life Insurance Trusts)
- Grandchildren Trusts (Crummey Trusts)
- QPRTs (Qualified Personal Residence Trusts)
- GRATs (Grantor Retained Annuity Trusts)
- IDGTs (Intentionally Defective Grantor Trusts)
- Special Needs Trusts
- Charitable Remainder Trusts

→ Charitable Lead Trusts

We also assist our clients in all aspects of the Probate Court administration process, including probating wills, prosecuting or defending will or trust challenges, and prosecuting or defending estate and trust administration issues.

Our breadth of experience allows us to provide comprehensive wealth transfer advice to our clients.