



Individual Estate Planning

The Individual Estate Planning group works closely with the firm's other practice groups to provide estate planning services for individual clients. This group provides both basic estate planning as well as more sophisticated planning in conjunction with outside advisors such as accountants, tax advisors, financial planners, and investment advisors.

Services include counseling and the preparation of documents which provide for the transfer of wealth to intended beneficiaries, whether during or after death, as well as documents which provide for the financial management of assets and personal health care decisions in the event of disability. The group also works with clients to form family entities, such as family limited partnerships, subchapter S-corporations, and limited liability companies, and assists clients in developing other strategies to maximize the protection of family assets from third parties.

The basic estate planning package includes wills, durable powers of attorney for property, medical care powers of attorney, HIPAA releases and authorizations, directives to physicians (commonly known as "living wills"), declarations of guardians for selves in the event of later incapacity, declarations of guardians for minor children, and appointments of agents for disposition of remains. Other popular planning techniques include prenuptial and postnuptial agreements, testamentary trusts, educational trusts, life insurance trusts, and trusts applicable to a variety of other situations.