



Trusts and Estates

Estate Planning

Federman provides sophisticated estate and personal planning to individuals and families that help clients avoid probate, appoint guardians for their minor children, protect assets from creditors, manage wealth for beneficiaries to ensure that children and grandchildren inherit property in a manner that is consistent with the clients' wishes, and minimize the taxes incurred when transferring wealth to successive generations. Our practice includes the preparation of wills, trust indentures, advance directives, health care proxies, special needs trusts, durable powers of attorney, irrevocable life insurance trusts, grantor retained annuity trusts, charitable remainder trusts, living trusts and dynasty trusts and related estate-planning documents. Our firm also assists clients with estate and trust administration matters and sophisticated planning involving family limited partnerships, sale and loan techniques, insurance planning and the creation and administration of holding companies.

Family Business Transition

Federman assists its clients in structuring and restructuring family businesses in the pursuit of long-term family goals, particularly in the area of real estate and real estate operations. When generational transition poses critical challenges, Federman coordinates with non-legal service providers including wealth managers, investment advisors, real estate property managers, trust companies, accountants, tax counsel and litigators, as necessary. Together with these professionals, we work to preserve the original vision and spirit of a family's company and address concerns openly and specifically about control and the division of wealth.

Succession and Advanced Planning

A key component of wealth management for families and wealth creators is succession planning. Our legal approach focuses on restructuring business entities and other holdings in a manner that achieves efficient wealth transfer, cohesive management and family governance across generations. Often these solutions require familiarity with the laws of jurisdictions outside of the States in which we practice. For this purpose, we maintain very close relationships with law firms in States that are at the

vanguard of wealth preservation and succession planning including the States of Wyoming, South Dakota, Nevada, New Hampshire and Delaware.

KEY CONTACT



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