

Family-Owned Businesses

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Many of our estate planning clients have significant portions of their wealth invested in closely held businesses, ranging from boutique investment advisory firms to major national and multinational business conglomerates. We regularly assist these clients with the unique challenges and opportunities faced by private business owners, including the long-range planning needed to transfer ownership and control of a family-owned business to the next generation.

As one of the nation's leading tax law specialty firms, we offer our family-owned business clients the in-depth expertise needed to integrate their complex business, tax, and estate planning strategies. We work closely with business owners to develop practical and comprehensive solutions for accomplishing their business objectives while also serving the long-term needs of their families.

NEWS

- December 1, 2011
Brenda Jackson-Cooper Joins Estate Planning Group
- December 23, 2010
CNBC Business News, "The Call"

PUBLICATIONS

- January/February 2010
Charitable Lead Trusts -- A Win-Win Strategy for Donors and Charities
Taxation of Exempts
- November 11, 2010
Deductibility of Charitable Contributions
35 Estates, Gifts and Trusts Journal 274