Wealth Planning

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ATTORNEYS

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We have extensive experience assisting high net worth individuals and families in preserving their personal wealth through sophisticated estate and gift planning. We help our clients design lifetime gifting strategies and comprehensive and flexible estate plans so that they can achieve their personal and family objectives through the tax-efficient transfer of assets, with individually tailored gift and estate planning techniques and instruments, including the use of:

- Living Trusts and other estate planning documents
- Qualified Terminable Interest Property (QTIP) Trusts and Bypass Trusts (including inter vivos QTIP Trusts)
- GST Tax Protected Dynasty Trusts
- Minor's and Crummey Trusts
- Educational Savings Options, including Section 529 Plans
- Grantor Retained Annuity Trusts (GRATs)
- Charitable Giving, including Charitable Lead Trusts and Charitable Remainder Trusts (CLTs and CRTs)
- Qualified Conservation Easements
- Qualified Personal Residence Trusts (QPRTs)
- Asset Protection Trusts
- Installment Sales to Defective Grantor Trusts
- Family Limited Partnerships and Limited Liability Companies
- Entity Valuations
- Private Foundations and other Exempt Organizations
- Estate Liquidity Planning

As part of each estate plan, we consider the impact of federal income, estate, gift, and generation-skipping transfer taxes on the transmission of wealth. We also understand that tax savings, while important, are often a secondary priority for our clients as they decide how and when to transfer assets to their family members and other beneficiaries.

NEWS

- December 15, 2011
  Ivins Attorneys Speak at DC Bar on Estate Planning with Retirement Plan Assets
- December 1, 2011
  Brenda Jackson-Cooper Joins Estate Planning Group
- December 23, 2010
  CNBC Business News, "The Call"

STRATEGIES & OPPORTUNITIES

- IRS Announces Offshore Voluntary Disclosure Initiative
- Federal Estate Tax Repeal Creates Uncertainty for Estate Plans in 2010
- Roth IRA Conversions Present Significant Planning Opportunities in 2010 and Beyond

PUBLICATIONS

- January 30, 2012
  Expedited Opt-Out Needed for OVDI Participants Who Owe No Tax
  Tax Notes
- January/February 2010
  Charitable Lead Trusts -- A Win-Win Strategy for Donors and Charities
  Taxation of Exempts
- May 18, 2011
  Carter Hood Comments on New Law Governing Foreign Trusts with U.S. Beneficiaries
- November 11, 2010
  Deductibility of Charitable Contributions
  35 Estates, Gifts and Trusts Journal 274
- September 27, 2010
  Gaps in the Seventh Circuit's Reasoning in Lantz
  Tax Notes