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Estate & Wealth Planning

You have spent a long time building your wealth. Whether modest or grand, the protection and distribution of your wealth after death can be a complicated and potentially expensive matter.

We are dedicated to preserving the legacy you have worked so hard to create. During life, we will help you establish estate and lifetime gifting plans that balance your goals while meeting the needs of your various beneficiaries and keeping tax efficiency always in mind. Following death, we assist fiduciaries in administering the estate and trust with tax compliance in mind to ensure that your wishes are respected.

Our estate and wealth planners are skilled and creative attorneys. We have extensive experience in family business succession planning, probate and trust administration and litigation, guardianships and conservatorships, family office planning, post mortem wealth and tax planning, retirement planning, and charitable giving strategies.

We partner with our colleagues in Jaffe's Tax, Corporate, Real Estate, and Family Law practice groups to form personalized, essential wealth preservation and transfer strategy. Our cross-disciplinary expertise is the ideal estate planning solution for individuals, entrepreneurs, and multi-generational family businesses. We appreciate how important it is to you to make the right arrangements now to ensure that your wealth – and your loved ones – are cared for into the future. Being your trusted advisor and partner is integral to the service we provide.

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