

Trusts & Estates

Brooks Pierce has a very sophisticated and creative trusts and estates practice with a focus on helping clients transfer wealth in a tax efficient manner. We represent owners of closely held businesses, professionals, executives and other high net-worth individuals in the structuring of their estate plans. Our attorneys assist individuals with traditional estate planning documents such as wills, revocable trusts and insurance trusts. We also regularly structure and implement more complex techniques including the following:

- Charitable planning, including the establishment of charitable remainder trusts, charitable lead trusts, and private foundations;
- Estate freezing strategies such as installment sales to grantor trusts, grantor retained annuity trusts (GRATs) and self-canceling installment notes;
- Generation-skipping transfer tax planning;
- Planning for business succession; and,
- Valuation techniques designed to produce lower tax values upon transfer through the use of family limited partnerships or limited liability companies.

Seminars & Events

- Mark Davidson Presents Business Planning Workshop