

Trusts & Estates

Leaving a Legacy

We represent owners of closely-held businesses, professionals, executives, and others in high-net worth positions. They say the only certain things in life are “death and taxes,” and trusts and estate planning touches both. Brooks Pierce trusts and estates attorneys have both the experience and the sensitivity to help you develop the estate plan that best fits your needs. Our team includes a Board Certified Specialist in Trusts and Estates Law.

Our services include:

Estate planning. We draft wills, revocable trusts, insurance trusts, powers of attorney documents, charitable planning documents (including remainder trusts and private foundations). We help clients structure plans that will offer estate and gift tax savings and minimize liability.

Sophisticated tax planning. We help clients meet their estate planning goals while focusing on tax-efficiency. We frequently help clients establish family foundations or charitable trusts as part of an overall plan.

Business succession plans. We assist clients with drafting business succession plans for closely-held companies, and can develop valuation strategies to minimize tax liabilities upon transfer.

Estate freezing. Our attorneys are experienced in multiple estate freezing strategies, such as installment sales to grantor trusts, grantor retained annuity trusts (GRATs), and self-cancelling installment notes.

How can we help you leave your legacy?

PEOPLE

Jamey Mavis Lowdermilk

William G. McNairy

Robert Saunders

Adam P.M. Tarleton

Sara R. Vizithum

NEWSROOM

News

72 Brooks Pierce Attorneys Recognized in *The Best Lawyers in America*® 2022 Guide
The Best Lawyers in America®, 08.19.2021

Brooks Pierce Receives 37 Tier-One Rankings in 2020 Edition of “Best Law Firms”
U.S. News – Best Lawyers® “Best Law Firms”, 11.04.2019

Twenty-Five Brooks Pierce Attorneys Recognized in Business North Carolina’s 2019 “Legal Elite” and “Hall of Fame”
Business North Carolina, 01.02.2019

Brooks Pierce Partner Certified as a Specialist in Estate Planning
11.29.2017

Publications

Proposed IRS Valuation Rules Could Have Major Impact on Family Wealth Transfers
09.15.2016