

## TRUSTS AND ESTATES



### PROBLEMS WE SOLVE/WHAT WE DO:

- Help people plan for the lifetime and testamentary transfer of wealth.
- Strategic charitable giving.
- Transfer money to take advantage of liquidity events.
- Pass our clients' assets to future generations.



### YOU MAY NEED A TRUSTS & ESTATES ATTORNEY IF:

- In the near future, you will have a change in your family situation (e.g., marriage, illness, divorce, birth of a child).
- You are a business owner, but you do not have a revocable trust.
- You do not have a power of attorney for your college-age kids.



### PRICING CONSIDERATIONS AND OPTIONS:

- We bill a flat fee for most planning work.
- Some advanced planning is billed hourly, but we may offer flat fee portions or discount.
- Estate/trust administration and contested trust/estate litigation are typically billed hourly.



### WE MAKE OUR CLIENTS MONEY/ SAVE OUR CLIENTS MONEY BY:

- We make our clients money by making introductions to other resources and investments.
- We save their future generations money by minimizing taxes and administrative expenses with proactive lifetime planning.



### WHY USE LP'S TRUSTS & ESTATES LAWYERS:

We are responsive, and we listen. We preach simplicity and look at the overall picture when it comes to tax planning. We will protect and advise you. We have deep experience working with and understanding clients who have significant wealth. We understand the issues they face from tax and non-tax perspectives.