Trusts & Estates

The Trusts & Estates Group at Levenfeld Pearlstein helps individuals and families achieve their business and personal planning goals, whether gift planning, charitable planning, business succession planning, or estate planning. The group, which includes four members of the American College of Trust and Estate Counsel, drafts basic estate plans as well as plans spanning multiple generations, states, and businesses. With decades of experience among the group's members, there is likely no scenario they have not encountered.

We have been ranked by Chambers and Partners since 2016, and partners Lauren Wolven and Robert Romanoff each have been recognized by the publication individually. Our clients routinely say they prefer working with us because we are responsive, preach simplicity, and look at an overall picture of an individual's wealth instead of simply the matter at hand.

For a one-page summary of Levenfeld Pearlstein's Trusts & Estates Practice Group, click here.

Probate and Trust Administration

We provide guidance and assist the fiduciary during each phase of the probate and trust administration process, which often includes tax planning, funding of trusts, contested estates, and collecting and distributing assets. We also guide fiduciaries and beneficiaries through contested matters and litigation, and provide solutions when issues arise. Further, we come up with creative options for refreshing outdated trusts.

Estate Planning Services

Regardless of your situation, our attorneys will assist in preparing wills, revocable trusts, powers of attorney, and other related estate-planning documents. We want to ensure wealth is passed down in the most streamlined and tax-efficient manner possible, consistent with the client's values, ethics, and personal goals.

We design and implement legitimate tax-reduction strategies for individuals and families using

LEVENFELD PEARLSTEIN, LLC®

leveraging techniques - such as dynasty trusts, intra-family sale agreements, family limited partnerships, grantor retained annuity trusts, qualified personal residence trusts, self-canceling installment notes, private annuities, and college savings plans - and by maximizing estate, gift and generation-skipping tax exemptions.

Business Succession Planning

We develop and implement business succession strategies for closely held business owners and their families, including multigenerational estate plans with LLC operating agreements, partnership agreements, and shareholder buy-sell agreements.

Multigenerational Wealth Planning

We design, consolidate, and implement tax and estate planning strategies to help generations of families plan for their future. When there are multiple parties involved, estate planning can be overwhelming. We aim to make this process easy and fair for your family and to provide peace of mind that your wealth will be protected for years to come.

Charitable Foundation Formation and Advisory

We have significant experience in forming, structuring, and advising tax-exempt and other not-for-profit organizations. Our representation includes forming public charities, private foundations, charitable lead trusts, and pooled income funds, obtaining tax-exemptions from the Internal Revenue Service and state agencies, advising on day-to-day transactions, and addressing UBTI issues.