Trusts & Estates

Fulfilling personal and business goals through thoughtful planning.

Levenfeld Pearlstein

The Trusts & Estates Group at LP helps individuals and families achieve their business and personal goals, whether through trusts & estates litigation, gift planning, charitable planning, business succession planning, or estate planning.

The group, which includes eleven members of the American College of Trust and Estate Counsel, drafts basic estate plans as well as plans spanning multiple generations, states, and businesses.

We have been ranked by Chambers and Partners since 2016, and several attorneys 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 wealth.

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"They are at the top of the market in terms of intellectual capital. They are also extremely nice people and are a joy to work with."

—Private Wealth Law Client

ESTATE PLANNING

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

We design and implement legitimate tax-reduction strategies for individuals and families using leveraging techniques—such as dynasty trusts, intra-family sale agreements, family limited partnerships, grantor retained annuity trusts, qualified personal residence trusts, self-cancelling installment notes, private annuities, and college savings plans—and by maximizing estate, gift, and generation-skipping tax exemptions.

PROBATE & 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 guide fiduciaries and beneficiaries through contested matters and litigation, providing solutions when issues arise. We also come up with creative options for refreshing outdated trusts.

TRUSTS & ESTATES LITIGATION

Our trust and estate litigators bring a wealth of experience to the table, representing mid- to high-net-worth individuals, estate executors and administrators, guardians, and individual and corporate trustees, among others. Our practice includes litigating will contests, estate claims, corporate fiduciary disputes, contested guardianships, heirship disputes, and trust-administration controversies, as well as family business conflicts of all types.

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.

MODERN ATHLETES

Success for today's athletes depends on a strong, coordinated team—and that includes legal counsel. At LP, we work seamlessly with agents, financial advisors, accountants, and staff to ensure everyone is aligned and moving toward the same goal. We stay in our lane, play our role, and execute with excellence. Click here to learn more.

CHARITABLE FOUNDATION FORMATION & 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.

FIDUCIARY ADVISORY SERVICES

With experience that spans trusts and estates, financial services, tax, real estate, and litigation, LP has the knowledge and resources to provide integrated fiduciary advisory services. Rather than taking a piecemeal approach to the issues that fiduciaries face, we provide cohesive, client-focused representation to address your needs and goals. We frequently advise wealth management firms on issues related to business risk and management, trust and estate administration, special asset administration, and fiduciary succession and trust termination.

Connect with our Trusts & Estates Group. We're ready to learn about your goals and discover how we can fulfill them through strategic planning. Connect with us today.

CONTACT US