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## **PRACTICE AREAS**

### **ESTATE AND BUSINESS PLANNING**

#### **Estate Planning:**

- Estate tax analysis and implementation of planning to minimize or avoid the estate tax
- Estate planning preparation
  - Drafting of revocable trusts
  - Drafting of wills
  - Drafting of durable powers of attorney
- Advanced estate planning
  - Irrevocable trusts
  - Use of life insurance
  - Estate tax payments planning
- Charitable planning
  - Charitable remainder trusts
  - Charitable lead trusts
  - Direct charitable gifts
- Special Needs Planning
- Post mortem planning and administration
  - Estate tax returns
  - Allocation agreements for irrevocable trusts
  - Transfer of assets
  - Exchange agreements
  - Implementation of estate planning provisions
  - Collateral areas of settling estates
  - Disclaimer Trusts
  - Generation Skipping Transfer Trusts
- Probate
- Conservatorships

#### **Business, Agri-Business Planning:**

- Entity choice and implementation (corporation, limited liability company, partnership)
- Succession planning
  - Buy/Sell agreements
  - Sales to third parties
  - Succession among family members
- General business counseling
- Lease arrangements
- Compliance on entity choice
- Overall tax planning
- Sale/Purchase of business
- Special Use Valuation for Family Farms and Ranches
- Estate Tax Coordination with Family Businesses
  - Long-term payout of estate taxes
  - Transfer to Qualified Heir(s)
  - Succession among family members
  - Discounts to reduce estate tax Liability