



LOOPER REED

LOOPER REED & MCGRAW P.C.

Trusts & Estates

Planning the accumulation, management and transfer of wealth in the most tax-efficient manner involves development and implementation of strategies across a broad spectrum. Looper Reed & McGraw attorneys provide a full range of estate planning and probate services as well as fiduciary litigation. We draft wills, trusts and restructure family businesses for management continuity and tax savings in future generations, as well as help individual and corporate executors and trustees administer decedents' estates and trusts efficiently and cost-effectively.

We have extensive experience in the design and implementation of complex estate and business plans for our individual and corporate clients. An effective estate plan must consider the various types of lifetime and testamentary family asset transfers that are designed to shield a family's wealth from taxation, while also accomplishing certain non-tax family objectives. As trusted counselors, the firm's attorneys help their clients and families to benefit from available estate planning techniques and to preserve family wealth for the future.

Planning for the business owner includes analysis of business succession issues, estate tax minimization strategies, liquidity analysis, equality of treatment among heirs and consideration of income needs of a surviving spouse.

The firm's estate planning experience includes the preparation of wills and trusts, family partnerships, limited liability companies, grantor retained interest trusts, qualified personal residence trusts, sales to intentionally defective trusts, charitable trusts, life insurance trusts, prenuptial agreements, disclaimers, qualified terminable interest trusts, qualified domestic trusts, offshore trusts, private annuities and other planning devices.

Understanding and appreciating the complex business interests and financial arrangements of the client, as well as important intrafamily relationships, are key elements in creating an effective estate plan. Sensitivity, a bond between client and attorney, and sophisticated expertise are as important today as they were to previous generations of counselors.

When an estate is fought over, our fiduciary litigation attorneys help trustees, executors and beneficiaries resolve a broad range of estate and trust disputes, many of which involve complex and sophisticated legal, tax and litigation issues.

In addition, estate planning today also requires comprehensive knowledge of other areas of the law. Our estate planners work synergistically with the firm's other attorneys in such areas as business law, taxation and real estate.

Whether planning for large or small estates, each is unique and important to the firm. Our estate planning attorneys take a custom approach to analyzing the nature of a client's assets to formulate a personalized estate plan for a client's family and business circumstances. Estate planning clients and their families are guided through the estate planning process with careful consideration of the impact of estate, gift and generation skipping taxes on the financial security of surviving family members.