

## Estate Planning Overview

Attorneys in Taft's Estate Planning practice work with clients on a private and personal basis to help them pass their property to their families both during lifetime and upon death. This personal planning takes into consideration estate and income tax issues, closely-held businesses, generation skipping issues including planning in situations involving second marriages, and planning for special needs of children and other heirs. We analyze and implement tax reduction and asset protection strategies, help our clients plan for possible disability, and coordinate life insurance and retirement planning.

To review and print more information on will preparation, estate tax planning, trusts and other topics, please click on our Understanding Estate Planning document. For information on how our group members work with national and international clients on employment transition and estate planning, please click [here](#).

In addition, any of the lawyers listed below would be pleased to answer your estate planning questions.

We provide extensive counsel as we analyze each client's personal, business, and tax needs and intentions. As part of each estate plan, we prepare the needed legal documents, which might include:

- wills
- revocable living trusts
- irrevocable life insurance trusts
- generation skipping and dynasty trusts
- trusts for education of children and grandchildren
- asset protection trusts
- trusts for minor or disabled children or other beneficiaries
- personal residence trusts



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- family LLCs
- financial durable powers of attorney
- health care powers of attorney and living wills
- mental health directives
- charitable planning, including charitable remainder trusts, charitable lead trusts, and private foundations

We guide our clients through the planning process, discussing the tax, family and business implications of the choices available. Our attorneys pride themselves on being clear in their explanations and responsive and careful listeners, as well as being technically skilled in drafting and planning.

Members of our practice lead professional estate planning organizations and have been recognized in *The Best Lawyers in America* and other peer-reviewed publications. We speak and publish on estate planning and tax topics and are deeply involved in our communities, making us excellent resources for our clients during the planning process.

We enjoy getting to know our clients, their families and their businesses. All of us, at one time or another, have needed some aspect of estate planning. We understand that the process can be stressful but ultimately will provide peace of mind. A good estate plan not only can reduce taxes and ensure that property and businesses pass in the way our client intends, but also reassure our client's loved ones that our client has considered their welfare in advance.



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