



## ESTATE PLANNING

Estate planning is really not for you. It is for your loved ones or to whomever else you want to leave your assets at your death. The line between your business life and your personal life blurs when it comes to estate planning. **You work hard to grow your personal, business and financial worth; we work hard to help you protect these assets** for your children and descendants and for the charities you may wish to honor.

Often in a strategic partnership with your investment and financial advisors, we help you plan for the future and protect your home, your life insurance, your stocks, your IRA and other retirement benefits, and all the other valuable things you have accumulated during your lifetime.

If you have a well-drafted estate plan in place, you will insure that your final wishes on how your loved ones should be provided for and how your assets should be distributed to your heirs are honored. A carefully drafted, comprehensive estate plan is critical to the management and preservation of a family's wealth. **Each plan must be tailored to meet a client's specific needs, goals, and objectives.**

Among the legal tools we utilize to customize a plan for the client are wills, trusts, powers of attorney, business succession plans such as funded buy-sell agreements and family limited partnerships, life insurance funded trusts, and charitable contributions. A wisely drafted plan also considers such concerns as estate tax reduction techniques and gift tax planning, the orderly transfer of a family business or farm, and advance directives regarding a client's wishes for medical care, potential disability, and funeral arrangements.

**Our estate planning attorneys focus on the individual needs of our clients, emphasizing personalized planning.** We have experience in business succession planning, gift and generation-skipping transfer tax planning and minimization, and the utilization of the marital deduction and the unified credit to eliminate or reduce federal estate taxes.

Burns Figa & Will attorneys also have significant experience in representing family members, including an estate's personal representative or executor, in probate litigation and disputes involving estates of all sizes. Litigation can arise out of a will contest or allegations of breach of fiduciary duty or financial mismanagement.

Our firm will always work hard to earn and deserve your trust.

Attorneys Practicing in this Area

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