

PROTECTION FROM ADMINISTRATIVE EXPENSE & DELAY

- DSPAs
- Fully Funded Revocable
- Living Trusts
- Nominee Partnerships

MAINTAINING CONTROL OVER YOUR PERSON & AFFAIRS

- DSPAs
- Health Powers
- Living Trusts
- Long-Term Health Care
- Disability Protection
- Salary Continuation Plans
- Living Wills

ASSURE LIFESTYLE/ TAX-FREE CONVERSION OF PAPER PROFITS

- CRATs, CRUTs, &
- NIMCRUTs
- Off-Shore Entities
- Non-Qualified Deferred Compensation Plans
- GRATs & GRUTs

FEDERAL GIFT AND ESTATE TAX REDUCTION

- QTIPs & QDOTs
- ILITs
- Charitable Foundations
- Charitable Remainder Trusts
- Grantor Retained Annuity Trusts & Unitrusts
- Family Limited Partnerships/LLCs
- Discounted Gifts
- QPRTs
- Split Gifts
- Conservation Easements
- Grantor Deemed Owner Trust
- Self-Cancelling Installments Notes

PROTECTION FROM LAWSUITS AND JUDGEMENTS

- Private Foundations
- CRATs, CRUTs, & NIMCRUTs
- GRATs & GRUTs
- Domestic Family Limited Partnerships
- Limited Liability Companies
- Off-Shore Entities
- Equality Stripping
- Captive Insurance Companies
- Asset Protection Trusts

AFFLUENT INDIVIDUALS AND FAMILIES

PASSING VALUE AND RESPONSIBILITY TO FAMILY MEMBERS

- Fully Funded Revocable Living Trusts
- Dynasty Trusts
- Wealth Replacement Trusts
- Private Foundations
- Testamentary Foundations
- Supporting Organizations
- GRATs & GRUTs
- Premium Financing
- Incentive/Education Trusts
- Asset Protection Trusts
- Grantor Deemed Owner Trusts
- Self-Cancelling Installment Notes

MANAGING THE VALUE OF FAMILY BUSINESS

- ESOPs & LESOPs
- Wealth Replacement Trusts
- Dynasty Trusts
- CRATs, CRUTs, & NIMCRUTs
- ILITs
- Grantor Deemed Owner Trusts
- Business Continuation Planning
- Liquidation Planning
- Family Split-Dollar Planning
- Buy Sell Planning

INCOME TAX REDUCTION

- Charitable Lead Trusts
- CRATs, CRUTs, & NIMCRUTs
- Family Limited Partnerships
- Conservation Easements
- Private Foundations
- Family Corporations
- Qualified Plans

Fees Quoted In Advance Based Upon Current Complexity and The Quality Of The Desired Results