Estate & Income Tax Planning & Estate Administration

Estate, Trusts & Income Tax Planning & Estate Administration

Chamberlain Hrdlicka possesses one of the largest and most accomplished estate planning and administration groups in the South and Southwest. There is no substitute for experience, and many of our lawyers in the group have been practicing in this field of law for many years. Clients know they can depend on our depth of experience to help them achieve their objectives today and for generations to come.

Our expertise in tax and business issues is the perfect foundation for the estate plans we develop for individuals, families and business owners. We understand how the system works, and we know how to structure plans that take full advantage of every key provision of the tax code. Since the potential tax consequence at death can often surpass 50 percent, it is worth investigating all avenues to assist a family in retaining as much wealth as the law will allow.

Honor The Past, Prepare For The Future

Knowing the law is not enough. Our estate planners work to understand your objectives to frame their recommendations accordingly. Every individual has a different perspective, different needs and different goals. We believe that imposing any type of formula solution is unfair to you and your family members. We prefer to listen first, then act on what you tell us. When we develop a plan, it fully reflects the input and directions we have received in our in-depth interviews with you. With our help, it becomes your plan.

Goals of This Generation

We bring a long-term perspective to our assignments. As we address the needs of the surviving spouse and children, we also keep an eye toward generations to come. Elements put in place today can have a profound effect on how wealth is retained and administered in the future. Our collective expertise addresses the challenges and stands the test of time. If you own a business, we take the necessary steps to ensure continuity and value for family members, shareholders, employees and customers. We work with you to establish goals and then to implement them efficiently and effectively. The final decisions are always yours but we provide you with the information and counsel you need to confidently make good decisions.

Estate Administration Assistance To Help Families Move Ahead

The estate administration duties that accompany the loss of a loved one can prove burdensome, even overwhelming, to the survivors. We approach estate administration with care. We assist when and where needed, applying appropriate elements of

Contact

Atlanta
191 Peachtree Street, N.E.,
Forty-Sixth Floor
Atlanta, Georgia 30303
Tel: 404.659.1410
Fax: 404.659.1852

Houston
1200 Smith Street, Suite 1400
Houston, Texas 77002-4310
Tel: 713.658.1818
Fax: 713.658.2553

Philadelphia
300 Conshohocken State Road
Suite 570
West Conshohocken, PA 19428
Tel: 610.772.2300
Fax: 610.772.2305

San Antonio
112 East Pecan Street, Suite 1450
San Antonio, Texas 78205
Tel: 210.253.8383
Fax: 210.253.8384

www.chamberlainlaw.com

Estate & Income Tax Planning & Estate Administration, Continued

post-mortem planning and ensuring that key deadlines and documents are handled in a timely and proper manner. We appreciate that there are hundreds of things you would rather do than focus on these responsibilities. With our assistance and follow-through, all of the elements of administering an estate can fall properly into place. To us, estate administration also has two parts: honor the past and prepare for the future.

A Complete Range Of Tools Wielded By Experienced Professionals

Chamberlain Hrdlicka helps you build a plan and then assists you in its implementation, using proven techniques and tools to produce the desired results. We adjust our approach to meet your needs. The degree of sophistication and complexity involved depends solely on your needs and best interests.

When Even the Best Estate Planning Documents Cant Avoid a Family Drama

We work with our clients to fashion estate plans and trust provisions that minimize the possibility of family conflict. Things like drafting crystal clear language in your estate planning documents and selecting the right people to serve as your fiduciaries (e.g. the executor of your Will or trustee of your trusts) go a long way to reduce the likelihood of litigation among family members. Unfortunately, family disputes and disagreements related to estates and trusts happen more frequently than we would hope. In the event family discord arises and leads to family members taking overtly adversarial positions, we have the knowledge and experience to help address those unfortunate situations. For example, we can work with the client to pursue methods of settling differences short of outright litigation such as mediation and arbitration. Our litigation team has a wealth of experience in the probate and trust area and we work closely with them when necessary to achieve the best possible outcome for our clients.

Areas of Expertise

- Wills
- Revocable trusts
- Family Offices
- Planning for incapacity, including powers of attorney and health care declarations
- Gifting techniques and strategies
- International estate planning, including offshore trusts
- Life insurance planning
- Trust planning
- Generation-skipping planning
- Charitable giving and charitable entities
- Succession planning for business owners, including buy-sell agreements
- Family limited partnerships, limited liability companies and closely held businesses
- Marital property agreements
- Estate administration and probate

Estate & Income Tax Planning & Estate Administration, Continued

- Preparation and filing of estate, inheritance and gift and generation-skipping tax returns
- Representation in estate and gift tax audits
- Litigation consulting
- Mediation, arbitration and litigation relating to all aspects of trust and estate disputes