# PRIVATE CLIENT SERVICES

The attorneys in our Private Client Services Practice Group work closely with clients to develop strategies to help protect and preserve wealth and family businesses. The Private Client Services Group provides estate planning, tax, and wealth-transfer planning services for high-net-worth individuals, closely held and family businesses, and charitable organizations. The Private Client Services Group also assists clients with estate and trust controversy and litigation matters.

The Private Client Services Practice Group attorneys hold a variety of credentials, including Florida Bar Board Certification, Masters of Laws in taxation and estate planning, and former certified public accountants. Several attorneys also author books, articles, and chapters, and teach or lecture on estate planning and estate and trust administration topics.

We help our clients to do what is best for themselves, their families, and their intended beneficiaries. We take pride in helping our clients discuss the issues that people often avoid discussing, and we do it compassionately and candidly.

## Estate and Tax Planning

Members of our team provide advice to clients regarding the efficient transfer of property to beneficiaries, and help lower estate, gift, generation-skipping and income taxes. Our attorneys also advise family and closely held businesses regarding ongoing operations, and how to properly transition the business to successor owners and younger generations. We build close relationships over many years with our clients and their families.

Our attorneys tailor estate plans for individuals by considering sophisticated and straightforward estate planning devices. These include wills, revocable and irrevocable trusts, life insurance trusts, trusts for minors, credit shelter trusts, gifts and gifting trusts, qualified terminable interest (“QTIP”) or marital trusts, qualified personal residence trusts, grantor retained annuity trusts, irrevocable grantor trusts (often referred to as intentionally defective grantor trusts), dynasty trusts, spousal lifetime access trusts (“SLATs”), qualified domestic trusts (“QDOTs”), and other estate freezing techniques. We also regularly advise on issues of family succession planning, such as shareholders' agreements, buy-sell agreements, formation and operation of S corporations, limited liability companies, and family limited partnerships.

We also handle a significant amount of international estate planning. Our attorneys represent many clients in South America, Canada, the Caribbean and Europe on pre-immigration planning, estate planning, and estate administration.

## Estate and Trust Administration

Members of our team provide legal services to both individual and corporate personal representatives, trustees, and beneficiaries, including matters before probate courts across the State of Florida. We advise fiduciaries regarding estate and trust administrations and their duties and obligations, including issues arising with beneficiary requests, accountings, investment policies, and terminations. We advise our clients on federal and state tax issues, including representation before taxing authorities on audits and controversies. We also assist trustees and beneficiaries with trust modifications, reformations, decanting, and trust conversions. Further, we establish both voluntary and involuntary guardianships for incapacitated persons, if needed.

## Estate and Trust Litigation

When disputes cannot be resolved amicably, we also assist personal representatives, trustees, creditors, and beneficiaries in appropriate litigation. We handle will and trust contests and claims of beneficiaries, and defend trustees from actions brought by beneficiaries. Our estate and trust controversy practice encompasses the full range of litigation services: pleadings, discovery (including electronic discovery), motions, settlements, trials and appeals.

## Charitable Giving and Organizations

We frequently counsel individuals on lifetime and testamentary charitable giving techniques, including the formation and operation of charitable remainder trusts, charitable lead trusts, donor-advised funds, private foundations and conservation easements. Our attorneys also work with publicly and privately supported charitable organizations, and advise in the ongoing administration of these organizations.

## Professionals

Sarah K. Balk

Charla M. Burchett

Sunny Dingman

Sarah J. Harnden

Shelly Wald Harris

Cassandra Jelincic

Linda Jorge Carbone

Brian D. Kennedy

Peter A. Lagonowicz

Patrick J. Lannon

Jordan G. Lee

Francis E. Rodriguez

JoAnne "Joleen" K. Searles

Ricardo J. Souto

Veronica Vilarchao

## Related Industries

Financial Services