



Trusts and Estates Services

Protecting loved ones and legacies. Protoraë Law's Trusts and Estates practice works collaboratively with clients to help them take care of everyone they love and everything they own. We unite practical legal advice about personal, family, financial, and business planning decisions. Our plans aim to promote efficient management of unique classes of assets while minimizing estate, gift, and certain income tax burdens. Our plans also help protect our client's dignity and property in the event of disability. Depending on the client's goals, we can assist with a range of estate planning strategies, including dynasty trusts, maximizing the value of retirement accounts, special needs planning for loved ones, and charitable giving.

Asset Protection. We help clients protect themselves against future liability risks, whether in the form of frivolous lawsuits or unfortunate accidents. We work with high risk professionals and those perceived as having "deep pockets" to minimize their financial exposure. Our asset protection clients can have some peace of mind in knowing that, in the unfortunate event of litigation, they have structured their holdings to minimize risk and increase the odds of settling for pennies on the dollar. Our asset protection services aim to free clients to focus on the important things—their loved ones and their life's work.

Business Succession Planning. Only a small minority of family owned businesses survive to the second generation. When multiple families are involved in ownership of a business (eg. when a founding partner has passed away) the potential problems multiply. For this reason, business succession planning is one of the key issues our attorneys address when planning estates for our entrepreneurial clients. Our attorneys help clients increase the odds by addressing the human dynamics and legal challenges that may stand in the way of a successful transition.

Administration of Trusts and Estates. By navigating clients through the probate and administration process, we help smooth the transitions and carry out estate plans. We advise personal representatives and trustees on how to fulfill their fiduciary duties and properly administer their trusts or estates. We also counsel beneficiaries regarding their rights throughout the process. For trusts and estates that include closely held or family businesses, our business attorneys are ready to assist with minimizing delays to the administration process and preserving the value of inherited business assets.

Trusts and Estates Litigation. Whether it is a will contest, concerns regarding a fiduciary's duties, an objection to estate administration, or interpretation of a will, when conflicts arise, we are ready to provide representation at all stages of the dispute resolution process. With attorneys practicing real estate, business law, and a deep bench of experienced litigators, we are well equipped to advocate for our clients' interests in disputed trusts and estates matters.

Areas of Focus

- Revocable Living Trusts
- Advance Medical Directives
- Powers of Attorney
- Last Wills and Testaments
- Spousal Support and Blended Family Planning
- Legacy Protection Trusts
- Retirement Account Stretch-out Trusts
- Dynasty Trust Planning
- Estate Tax Planning & Basis Management Strategies
- Health & Education Exclusion Trusts
- Special Needs Trusts
- Pet Trusts
- Charitable Planning
- Asset Protection Trusts
- Business Succession Planning
- Family Limited Partnerships & Limited Liability Companies
- Probate
- Will Contests



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Trusts and Estates
Business Transactions
Corporate & Business Entities



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