Wealth Transfer Planning

For many high net worth clients, a basic estate plan is not enough. We creatively employ sophisticated planning techniques to maximize wealth transfer and minimize taxes for these clients. In every case, we consider the estate's unique aspects to customize a comprehensive plan consistent with the client's personal, charitable and financial goals.

Customized Wealth Transfer Solutions

While wealth creation can be complicated, clients have three basic options when it comes to wealth transfer. They can leave their estates to:

1. Family and/or friends;
2. The community through one or more charities; and/or
3. The government through the payment of transfer taxes.

Combining knowledge of the law, legal strategies and innovative planning solutions, we develop unique, comprehensive plans that may include: Grantor Retained Annuity Trusts; Intentionally Defective Grantor Trusts; Irrevocable Life Insurance Trusts; Charitable Lead Trusts; and/or Charitable Remainder Trusts, as well as innovative combinations of these strategies to produce even more powerful results.

Collaborating for Success

We make a concerted effort to educate our clients and other professional advisors on the factors that should be considered in long-term wealth transfer planning. As long-time instructors of advanced estate planning techniques at UCLA Extension and frequent speakers at major tax and estate planning institutes, we raise awareness and disseminate the knowledge that has helped us effectively resolve our clients' needs for over five decades.

Significant wealth can lead to complex personal and financial issues and result in family conflict. Our goal is to help our clients implement wealth transfer plans that minimize potential conflicts, while promoting enduring legacies for generations to come.

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Preserving Your Legacy

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