FOWLER WHITE BOGGS BANKER
ATTORNEYS AT LAW

The power of experience®

Wealth Preservation, Trusts and Estates

Fowler White Boggs Banker's Wealth Preservation, Trusts and Estates Group advises clients in all matters pertaining to wealth protection, estate and administrative planning, international estate planning, business succession planning, preparation of wills and living wills, revocable trust agreements, irrevocable trust agreements and family limited partnerships. Additionally, clients are counseled on the use of powers of attorney, court guardianship proceedings, probate litigation, representation organizations and pre-immigration tax planning. We value the long term relationships we establish with our clients and we continue to assist them as their personal and financial circumstances change over the years.

The work of our Wealth Preservation, Trusts & Estates Group also includes planning and preparing documents for the management and transfer of an individual's estate during his or her lifetime, upon incapacity, and upon death. This includes advice on the income, gift tax returns, generation-skipping and death tax considerations directed to achieve tax savings within the individual's planning requirements.

Members of the Wealth Preservation, Trusts & Estates Group represent trust companies, financial institutions, high-net-worth individuals, corporate fiduciaries, non-profit entities, and owners of privately held businesses. Our lawyers are active in local, state and national estate planning and tax groups, both as participants and as lecturers. Our lawyers monitor, research and advise on the ever changing laws and the time sensitive issues that are involved in the estate planning process. Our lawyers have an added advantage because they combine litigation skills with their experience in the areas of tax, trusts, estates, and probate.

Some of the specific areas covered by the Wealth Preservation, Trusts and Estates Practice include the following:

- Preparation of Wills, Revocable Trust Agreements, Irrevocable Trust Agreements, Family Limited Partnerships, Living Wills and Durable Powers of Attorney Family Wealth Transfer Planning, including planning to minimize estate and gift tax
- Business Succession Planning
- Non-resident and pre-immigration tax planning
- International Estate Planning
- Formation and representation of charitable organizations
- Representation of personal representatives and trustees in estate and trust administration
- Preparation of estate tax returns, gift tax returns and fiduciary income tax returns
- Probate and Fiduciary Litigation

Trust, Estate, and Probate Litigation

The Fowler White Boggs Banker's Wealth Preservation, Trusts and Estates Litigation Team represents clients in any matter that arises from probate, family trust, or family partnership disputes. Our lawyers have experience with representing both plaintiffs and defendants in a wide variety of cases including will contests, breach of fiduciary responsibility and asset management disputes. Our philosophy is to be cost effective, yet not compromise our clients' best interests.

Practice Leader

Robert H. Waltuch

Practice Team

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