

Let's break it down... how can I help you?

I RUN A BOUTIQUE LAW PRACTICE THAT CATERS TO
ESTATE PLANNING AND ASSET PROTECTION

Revocable Trusts, Marital Trusts, & Irrevocable Trusts

- GIVES YOU CONTROL OVER HOW YOUR ASSETS PASS, BUT DOES SO WITHOUT ANY COURT INVOLVEMENT – INCLUDING PROVIDING GUIDELINES FOR THE USE OF ASSETS THAT MAY BE INHERITED BY CHILDREN IN THE EVENT OF YOUR DEATH (LIKE LIFE INSURANCE).
- REVOCABLE TRUSTS CAN BE AMENDED OR REVOKED AT YOUR DISCRETION
- MARITAL TRUSTS ALLOW SPOUSES TO MAXIMIZE THEIR \$1.8M ESTATE TAX EXEMPTION BY ALLOWING A SURVIVING SPOUSE TO FULLY UTILIZE THEIR DECEASED SPOUSE'S EXEMPTION – THEREBY DOUBLING THE ASSETS THAT WILL PASS FREE OF OWING ANY ESTATE TAX.
- IRREVOCABLE TRUSTS CANNOT BE AMENDED OR REVOKED, BUT ARE USED FOR VARIOUS REASONS, SUCH AS ASSET PROTECTION FROM ESTATE TAX (INCLUDING ACTING AS AN ALTERNATIVE VEHICLE FOR SETTING ASIDE MONEY FOR CHILDREN WHILE DIMINISHING YOUR ESTATE FOR ESTATE TAX PURPOSES) AND PROTECTING ASSETS FROM MEDICAID AS WE AGE AND REQUIRE MORE CARE.

Last Will and Testament

- DESIGNATE A GUARDIAN FOR YOUR CHILDREN IN THE EVENT OF YOUR DEATH
- SET OUT HOW YOU'D LIKE YOUR ASSETS TO BE DISTRIBUTED UPON YOUR DEATH

Business Start-up & Succession Plans

- FORMING YOUR BUSINESS AND HELPING YOU WITH ANY NEEDED FORMS UPON START-UP
- CREATING A BUSINESS SUCCESSION PLAN TO KEEP YOUR BUSINESS RUNNING IN THE EVENT OF YOUR INCAPACITY OR DEATH, OR ALTERNATIVELY, CREATING A ROADMAP FOR YOUR LOVED ONES TO WIND IT DOWN.
- A BUSINESS SUCCESSION PLAN WILL ALSO MAKE SURE CASHFLOW REMAINS CONTINUOUS IN THE EVENT OF YOUR INCAPACITY OR DEATH.
- HAVING A SUCCESSION PLAN IN PLACE MEANS YOUR EMPLOYEES AND VENDORS CAN ALWAYS BE PAID, ALLOWING CONTINUITY OF DAY-TO-DAY AFFAIRS.

I also do **Prenuptial Agreements**, which are important for anyone getting married that owns a home, has assets and investments, is expecting a significant inheritance in their lifetime, was previously married, has children from a previous relationship, or simply feels the need to memorialize anything in writing between themselves and their future spouse.