

Family & Closely-Held Business Planning

Many of our clients own family or closely-held businesses. Our attorneys advise on the legal structure of these business investments with an eye toward tax mitigation and succession planning. We prepare agreements to control the management and disposition of commercial interests. Maximizing the value of our clients' holdings for their heirs is one of the most important aspects of our Private Wealth Planning practice.

Our expertise in this area includes business restructuring that places owners and families in the most tax advantaged position. This can also include the creation of partnerships, irrevocable trusts and shareholder agreements. We are well versed in identifying and averting potential estate-related problems that can occur in the day-to-day commercial transactions throughout the lifetime of a business.

Related Practices

Private Wealth Planning

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