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ESTATE & BUSINESS PLANNING

The structure, organization, and intention behind a client's estate and business holdings is just as important as their value. We help clients align their estate and business holdings to their intentions and goals, with a focus on risk management and protection.

For clients with large estates, advanced estate planning above and beyond the basics is essential to minimize or even eliminate estate taxes. We start by analyzing how assets are held and reorganize the estate where appropriate for the most optimal transfer to heirs.

We provide clients with expertise in the following areas:

Business

- ✓ Exit Strategy / Business Succession
- ✓ Entity Restructure
- ✓ Business / Executive Benefits
- ✓ Retirement / Pension Management

Estate

- ✓ Philanthropy / Legacy
- ✓ Estate Exemption Maximization
- ✓ Dynasty Planning
- ✓ Estate Tax Reduction

INDUSTRY RECOGNITIONS



MIRACLE MILE IN THE NEWS



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