

Trusts & Estates

RELATED SERVICES

Gift & Estate Tax
Valuations
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Tax

PROFESSIONALS

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A lifetime of accomplishments. Family. Legacy. How to preserve assets and transfer wealth is one of the more challenging issues facing high net worth individuals and families. Tax laws and compliance regulations are complicated, and proactive guidance is needed for you to achieve your goals. Our Wealth Transfer team provides guidance in the establishment of trusts, estate planning, charitable giving and gifting. Working with your advisors, we will help you leave your legacy the way you want.

Our services include:

Estate Planning & Compliance

- Review of estate planning documents
- Preparation of federal and state estate, gift, fiduciary, and exempt organization income tax returns
- Representation before the IRS and state taxing authorities

Wealth Transfer

- Structuring of trusts
- Evaluation of generation-skipping transfer tax issues
- Multi-generational planning
- Business succession planning
- Education of future beneficiaries regarding wealth preservation across multiple generations
- Counseling of fiduciaries regarding administration of trusts

Our team works with you and your advisors to select the right wealth transfer vehicle that will help you achieve your goals. Our experience includes working with a variety of vehicles including:

- Grantor Retained Annuity Trusts (GRATS)

- Qualified Personal Residence Trusts (QPRTS)
- Charitable Remainder Trusts (CRTS)
- Charitable Lead Trusts (CLTS)
- Family Limited Partnerships
- Sales to Defective Grantor Trusts
- Intra-Family Loans
- Life Insurance Trusts
- Planning for Retirement Assets

Private Foundations & Public Charities

- Establishment, operation, and compliance for private foundations and public charities
- Income tax return preparation and compliance

Tax Alerts

IRS Postpones Filing and Payment Deadlines for Gift and Generation Skipping Transfer Tax (GST) Returns from April 15, 2020, to July 15, 2020
March 30, 2020

Welcome News for Wealthy California Residents
June 10, 2019

Tax Cuts and Jobs Act—New Opportunities to Minimize the Tax Cost of Transferring Wealth
January 15, 2018

Recently issued Proposed Regulations may Significantly Affect Valuation Discounts on Intra-Family Transfers
August 9, 2016

HCVT in the News

Tax Cuts and Jobs Act - Significant Changes to Estate & Gift Taxes
Stacy Yamanishi, Tax Partner
Orange County Business Journal, March 7, 2018