

ESTATES & TRUSTS

ESTATE PLANNING, WILLS & TRUSTS

At Gallagher & Kennedy, we help clients prioritize their goals and objectives for estate planning, including will and trust preparation and other sophisticated wealth transfer techniques. We also help clients review their assets to consider optimal ownership positions to minimize estate and gift taxes.

When issues arise that require specific expertise in areas such as real estate, insurance or other practices, we are able to collaborate with other Gallagher & Kennedy experts to advance the wealth management objectives.

Several key areas of our estate planning practice include:

- Wealth preservation techniques, gifting programs, generation skipping transfers and charitable planned giving.
- Preparation and administration of all types of trusts, including revocable and irrevocable trusts, charitable trusts, children's trusts, educational trust planning, special needs trusts, grantor retained annuity trusts, family limited partnerships, and trusts designed for multiple generations.
- Preparation of wills and powers of attorney for both health care and business purposes.
- Business succession planning to meet client objectives.