

# Estate and Wealth Planning

## Practice Areas

### Estate and Wealth Planning

The phrase failure to plan is a plan to fail may hold true in no other area as much as Wealth and Estate Planning. Whether you are seeking to protect wealth you have accumulated or inherited, or simply desire to empower and protect your loved ones, we are here to educate, advise and collaborate with you and other trusted advisors to ensure your objectives are met.

Taxes, creditors, divorce, family disputes and other human behavior factors are all constant threats. Our team includes attorneys, CPAs, and advanced wealth management certificate holders with the experience necessary to mitigate risk and present opportunity for savings and wealth accumulation by offering a variety of advice and strategy.

We regularly work with individuals, and their team of advisors, on strategies to design and implement the following:

- Wills
- Trusts
- Estate Tax Planning
- Income Tax Planning
- Wealth Transfer
- Business Succession planning

## **A Rich Tradition. A Bright Future.**

We exist to help our clients achieve their visions for the future.

We stand shoulder to shoulder with our clients, helping them to anticipate, avoid and overcome challenges and obstacles to their successes.

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