

HATCHER · STUBBS

ATTORNEYS AT LAW

PRACTICE AREA:

ESTATE PLANNING AND ADMINISTRATION

Hatcher Stubbs' estate planning attorneys offer comprehensive wealth preservation services, having expertise in income, gift, estate and generation-skipping taxation, employee benefit and retirement planning, charitable giving, and business succession planning. As part of our team approach to client service, attorneys in the Estate Planning and Administration Group frequently work with our clients' accountants, financial service professionals, and other trusted advisors.

Our estate planning services range from drafting simple wills to using more sophisticated planning techniques for the transfer of wealth in complex estates, such as family partnerships, grantor retained annuity trusts (GRATs), charitable trusts, irrevocable life insurance trusts (ILITs) and qualified personal residence trusts (QPRTs). Regardless of the tax complexity, we are sensitive to our clients' personal goals and the inherently delicate issues involved in estate planning. We aim to help individuals, families, and business owners accomplish these goals in a tax efficient manner.

Representation of family businesses is an important part of our estate planning practice. Our attorneys routinely advise clients in the formation and maintenance of family partnerships and limited liability companies. We also work with families and their advisors in creating business succession plans, be it to the next generation or to key shareholders.

Charitable giving is also an important aspect of our clients' estate planning needs. We work closely with our clients to maximize the personal and tax benefits of their planned giving strategies through charitable lead and remainder trusts, private foundations, donor-advised funds and other deferred giving arrangements.

Our attorneys are experienced in planning for clients with large IRAs and the many complex issues involved with planning for required minimum distributions, proper handling of beneficiary designations, and avoiding unnecessary taxation.

In addition to the planning aspect of our practice, we have a long history of providing estate administration and post-mortem planning services. We maintain an active probate practice and, in coordination with our Fiduciary Litigation Group, represent fiduciaries and beneficiaries in trust and estate administration. We also prepare and file federal estate and gift tax returns, as well as handle any representation before the IRS and Federal Courts in connection with gift and estate tax audits and litigation.

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