


## private wealth



Helping you achieve your wealth preservation goals, delivered with care

Our Private Wealth team focuses on two things – you and guiding you through your unique planning goals. Our experienced attorneys guide individuals, families, and business owners through estate planning, philanthropic planning, gifting strategies, probate and trust administration, marital agreements and if needed, trust and estate litigation.

The security and transfer of assets from closely held businesses or high-net-worth individuals gets harder when procrastinated, especially in emotional times. That's why our attorneys start early to safeguard you, your family members, and your assets.

We're known across the country for our knowledge and capabilities in this area and have worked with some of America's wealthiest families. Several of our lawyers are fellows of the American College of Trust and Estate Counsel and are ranked by the Chambers High Net Worth and Best Lawyers in America guides for their work in private wealth matters. This reflects, as one client noted to Chambers, our status as a "top-notch firm" in this space.

### estate planning

Estate planning isn't just about avoiding estate taxes after death. Proactive estate planning can ensure your physical and medical care before death, protect your assets after and direct multigenerational wealth transfers. It also includes strategic exit plans for business and retirement savings planning well in advance, so you can truly enjoy retirement. And yes, tax minimization is part of it too - we provide gift tax, generation-skipping transfer tax, estate tax and income tax advice customized to your situation.

Our typical planning will establish a revocable trust to avoid public probate administration and secure the privacy of your affairs upon your death. Then we file documents that delegate authority to your personally chosen trustee to make decisions on your behalf if you cannot, as well as when you are gone. A financial Power of Attorney (POA) gives the ability to someone else to make financial decisions for you if incapacitated. Similarly, a POA for health care and health care directive assign permission to make health care decisions and incorporates a living will.

We also help shield your assets such as life insurance, IRAs and other retirement benefits by setting up a Transfer on Death or Pay on Death (TOD or POD) or other beneficiary designation.

### probate and trust administration

Serving as a trustee or personal representative of a loved one's estate can be overwhelming, both emotionally and logistically. We're here to assist and advise you through it all, including sometimes tedious probate and trust administrative procedures.

We routinely prepare estate and inheritance tax returns, post-mortem estate planning, probate and trust administration, retitling and transfer of assets plus the transition of businesses to the next generation. We also make sure taxes are paid on time and can even serve as personal representatives and trustees if needed.

### fiduciary litigation

Thompson Coburn's Fiduciary Litigation practice holds a distinguished position as counsel of choice for institutional and individual fiduciaries in sophisticated trust and estate matters. Our practice combines technical precision with strategic vision to protect and advance our clients' interests.

Learn more about our services in this area in our [Fiduciary Litigation](#) overview.

### charitable gift planning

For those who want to give back, we can help. We represent many philanthropic individuals in developing and implementing their charitable plans. We have created private foundations for our clients as well as charitable remainder trusts, charitable lead trusts, gift annuities, lifetime gifts and bequests. Our clients are successful businesspeople, private investors, entrepreneurs and families whose wealth is self-made or has accumulated over multiple generations.

### gifting strategies

You worked hard and now it's our turn. We will efficiently pass your wealth to your next generation by carefully analyzing your situation and making sophisticated gifting suggestions. These might include minors' trusts, insurance trusts, Grantor Retained Annuity Trusts (GRATs), Qualified Personal Residence Trusts (QPRTs), sales-to-lifetime gift trusts. We will develop a strategy with you and explain the right tactics to maximize your wealth for future generations.

### marital agreements

Regardless of how simple or complicated your assets are, we can help provide peace of mind through premarital and marital agreements. You can rest assured the agreement will accurately reflect both parties' understanding and meet all the legal requirements to ensure the proper allocation of assets if the need ever arises.

### family wealth and business

Our attorneys are committed to the success of multi-generational families and attuned to the often-complex interplay between family dynamics and business operations. We advise high-net-worth individuals and their families on a range of legal and business issues, helping them grow and transfer wealth, save millions in taxes, and pursue new business and charitable opportunities.

Learn more about our services in this area in our [Family Office](#) overview.

professionals

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John P. Amato

**bill**

Bill R. Bay

**ninette**

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