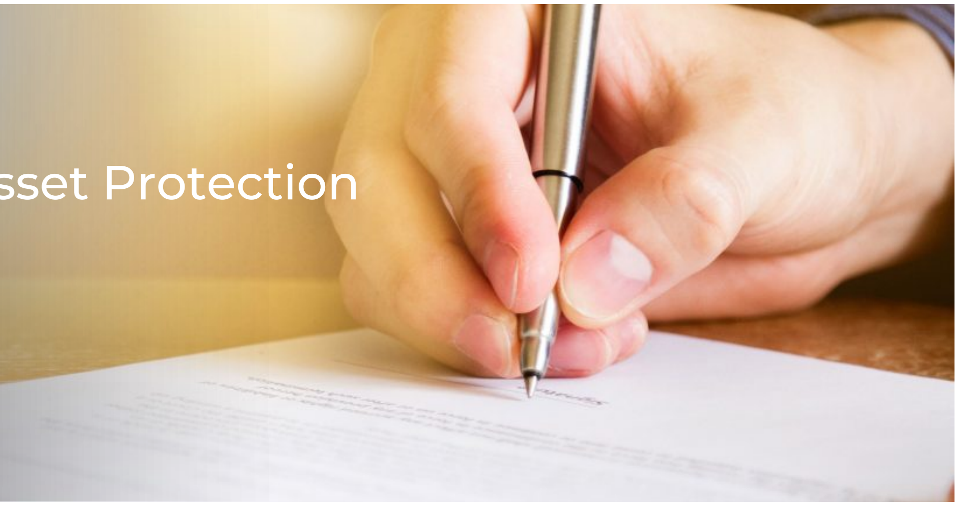

CAPABILITIES / TRUSTS & ESTATES

Estate Planning & Asset Protection

Obermayer works closely with clients to formulate and implement effective wealth transfer plans that preserve their legacy, balance flexibility and control with appropriate tax planning, and take into account the interests of each generation.

OVERVIEW

"We believe the practice of law is about helping our clients plan for their future, preserve their funds, and achieve tax savings toward the ultimate goal of creating a peace of mind and the client's legacy."

Our Value

Obermayer's Trust and Estate attorneys are committed to helping you protect your legacy through effective estate planning. Our sophisticated planning techniques consider all applicable federal and state income, gift, and death tax exemptions, and we may recommend consideration of other documents or strategies to maximize protections afforded, such as:

- Irrevocable trusts
- Grantor trusts
- Dynasty trusts
- Qualified personal residence trusts
- Generation-skipping tax planning
- Qualified domestic trusts
- Special or supplemental needs trusts; or,
- Specifically tailored beneficiary designations for retirement planning.

Our clients are well served by having individually drafted documents, such as wills (with or without tax planning), durable powers of attorney (including financial and healthcare powers of attorney with advance directives for end-of-life decision-making , or living wills), or living trusts to provide for lifetime management of assets in the event of incapacity.

Preservation of Funds: As part of the overall estate planning process, we advise clients on planning for preservation of funds. Strategies and solutions vary greatly, and by being proactive, clients gain comfort that they have taken appropriate, timely action to protect their future financial stability.

Lifetime Gifting: Many of our clients wish to incorporate lifetime gift and tax plans for their family, relatives or charity interests. We use a variety of techniques to develop a gift plan that will achieve the most advantageous results to meet our clients' tax and personal gifting needs, minimize the individual's taxable estate, protect beneficiaries from threats of divorce or financial insecurity, and achieve philanthropic goals. Our lawyers also assist with the preparation and filing of any required Federal Gift (and Generation-skipping Transfer) Tax returns.

Our Clients

We understand that each client situation is unique, that different types of assets may require different planning techniques and that the strategies to transfer and protect wealth are not a one-size-fits-all. We also understand that an effective estate plan addresses the challenges of family dynamics and often requires special care or unusual forms of management. Whether the circumstances involve assisting a blended or non-traditional family, or exploring long term care for an individual with a disability, we delve into the details to provide guidance and peace of mind. Estate planning is most effective when it is a collaborative process with our clients and is best accomplished through continued conversation as needs and goals may evolve over time, especially in light of the constantly changing federal tax law landscape.

Our Focus

Our focus is on helping clients develop a plan to protect their assets and transfer wealth to their heirs and favorite charities while minimizing transfer and income taxes. We help clients evaluate their assets and their individual goals to create documents not only to provide for the disposition of assets following death, but also for family or generational planning, and healthcare and financial management during illness or incapacity. We work with clients throughout their lifetime to review estate planning documents whenever family and financial circumstances change significantly and after major events occur (e.g., marriage, divorce, birth of a child or a death in the family) to make sure the plan still properly meets their needs and ultimately allows them to pass on their legacy to future generations as efficiently as possible. We are committed to getting to know our clients and their goals so that we may tailor our advice accordingly, often as part of a planning process which involves close collaboration with the client's other advisors, financial managers, and accountants.

Awards Won*

*Click here for a description of the standard or methodology on which the awards and honors are based. No aspect of this advertisement is approved by the Supreme Court of New Jersey.

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RELATED CAPABILITIES

- Business Succession Planning
- Charitable Giving
- Fiduciary Litigation
- Individuals & Private Clients
- Nonprofit Organizations
- Tax
- Trust & Estate Administration