Estate & Wealth-Transfer Planning

Wooden McLaughlin provides comprehensive representation to families, individuals, estates and trusts, closely-held businesses, and foundations in estate planning and wealth-transfer matters. A significant focus of our practice involves advising individuals on sophisticated wealth transfer matters. We offer a broad spectrum of estate and wealth-transfer planning services to fulfill our clients' dispositive desires and to assist in minimizing the impact of taxes. We strive to combine creativity with practicality in finding appropriate solutions for each individual and family.

Our estate and wealth-transfer planning services include:

- Wills and codicils
- Revocable trust agreements and testamentary trust agreements
- Irrevocable trust agreements, including irrevocable life insurance trusts (ILITs), qualified personal residence trusts (QPRTs) and grantor-retained annuity trusts (GRATs)
- Charitable trust agreements, including charitable lead trusts (CLTs) and charitable remainder trusts (CRTs)
- Lifetime and testamentary charitable gift planning
- Creation and governance of family charitable foundations
- Individual retirement account (IRA) planning

Key Contacts

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