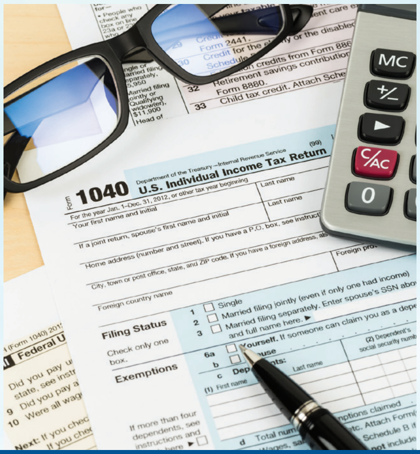

Estate & Tax Planning

Estate Tax
& Planning

STRADLEY RONON

Preserving wealth and optimizing an estate's value through careful estate and tax planning require a comprehensive knowledge of trust, estate and tax laws, and strategies to limit tax exposure. Stradley Ronon's attorneys have extensive experience helping high-networth individuals, owners of closely held businesses, entrepreneurs, executives and their families form, structure and administer trusts and estates, reduce their tax liability, and implement an effective personal planning strategy.

Our team of estate and tax planning attorneys handles all aspects of estate and tax planning, including providing counsel on the development and implementation of sophisticated estate planning techniques designed to achieve our clients' personal objectives and transfer wealth in the most tax-efficient manner. Our attorneys also assist clients with nontax aspects of estate and personal planning, such as liability concerns, centralized management of assets, transitioning ownership of a family business, premarital agreements, and effective trusts for children and grandchildren.

Serving as "family advisers," we offer pragmatic guidance on complex issues, helping our clients provide for future generations. Our attorneys work closely with accountants, financial advisers and other professionals to create a comprehensive plan to accomplish clients' goals.

Our Services

Estate Planning In addition to creating estate planning documents such as wills, powers of attorney and living wills, we employ a variety of effective estate planning tools to produce tax-favorable results and achieve our clients' estate planning goals, including:

- revocable trusts and irrevocable trusts
- irrevocable life insurance trusts
- generation-skipping and dynasty trusts
- qualified personal residence trusts
- grantor-retained annuity trusts
- charitable lead trusts, charitable remainder trusts and charitable foundations
- asset-protection trusts, including domestic and offshore trusts
- family limited partnerships

Tax Planning

Our attorneys are skilled at designing, implementing and defending strategies to save gift, estate, income and generation-skipping transfer taxes and accomplish our clients' objectives, including:

- lifetime giving
- intra-family loans
- insurance planning
- gift leveraging through the use of QPRTs and GRATs
- minority interest discounts
- charitable donations
- creation and implementation of private foundations and charitable trusts

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About Stradley Ronon

For more than 95 years, Stradley Ronon has helped private and public companies – from small businesses to Fortune 500 corporations – achieve their goals. With nine offices and more than 200 attorneys, Stradley Ronon is proud to help companies manage their legal challenges and grow their businesses.

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