Trusts, Estates & Personal Planning

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Stradley Ronon

Our Practice

Stradley Ronon provides in-depth planning to ensure that your family is cared for, your assets are distributed exactly as you wish, and your estate is managed by people who understand your ideas and will carry out your goals.

We prepare hundreds of wills each year, design many wealth-preserving estate plans and help create charitable foundations of many types. We are often called on to manage the transfer of our clients' wealth. But our most rewarding role may be in providing continuity and a steadying force between the generations of families we have served for decades.

Administration of Trusts & Estates

Our attorneys have extensive experience in trust & estate administration matters. Our clients include corporate and individual executors, administrators and trustees. From probating wills and collecting valuable assets to ensuring proper documentation, recordkeeping and accounting to beneficiaries, our experienced attorneys help our clients optimize the value of their trusts and estates. Taking a collaborative approach, we work closely with each client and with attorneys from our tax, real estate, corporate and litigation practices to provide comprehensive, customized guidance on the many issues that may arise in the administration of trusts and estates.

Business Succession Planning

Our business succession planning practice seeks to provide the best business succession result for the family and the business. Each situation is unique, and we work with our clients to understand the family dynamics and develop a custom solution. In addition, we are focused on maximizing the value of the business, transferring the maximum amount of wealth in the most tax-efficient manner, and addressing all asset-protection and family-succession issues and goals.

Estate & Tax Planning

Our attorneys handle 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 asset protection, centralized management of assets, transitioning ownership of a family business, premarital agreements, and effective use of trusts for children and grandchildren. Serving as "family advisers," we offer pragmatic guidance on complex issues, helping our clients provide for future generations.

Fiduciary Litigation, Will Contests & Family Disputes

In the dispute resolution area, our attorneys have extensive experience working with individual and corporate fiduciaries, investment advisers/managers, family offices and individuals. Among other matters, we handle legal proceedings and controversies related to will contests, court accountings, surcharge actions, removal actions, fiduciary fee disputes, insolvent estates, tax audits and tax controversies, and controversies surrounding the construction of wills and trusts. Our attorneys also use alternative dispute resolution methods, such as arbitration or mediation, when appropriate.

Guardianships

We handle cases for guardians of both the estate and the person of incapacitated individuals, and we represent both individual and corporate guardians for minor children, elderly individuals and disabled individuals. In doing so, we handle all aspects of guardianships, from securing the guardianship appointment through advising the guardian in his or her fiduciary role, with a practical and sensitive approach. Our attorneys also handle cases and provide advice to family members with respect to guardians who have abused their authority.

Premarital, Postnuptial & Cohabitation Agreements

Our attorneys have extensive experience negotiating, drafting and handling all issues regarding premarital, postnuptial and cohabitation agreements. We prepare these agreements as tools not only to protect our clients' assets but

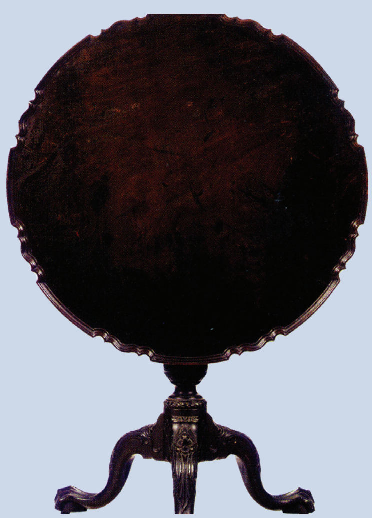
also to address issues such as debt responsibilities, support obligations, real and personal property ownership, property division upon divorce or death, rights to income and expense-sharing arrangements, and the manner in which disputes will be resolved (e.g., through arbitration or mediation, as opposed to litigation).

Private Foundations

Our attorneys help clients establish, obtain tax exemptions for and, when necessary, dissolve private foundations. We also assist with regulatory compliance and legal issues, providing guidance to founders, board members, officers and employees on all aspects of private foundation operations, and enabling them to focus on charitable giving.

Retirement Planning

With respect to retirement assets, we counsel clients on how best to structure and time investments, take or refrain from taking distributions to optimize the value of these assets, and limit tax liability and avoid penalties. We also provide advice on how these assets can be used to fund trusts for their families and to carry out their charitable intentions. We are well-informed in a wide range of financial products and investment vehicles, and adept at advising on how they can be used to help you achieve your financial goals.



Record-Setting Auction Sale of Rare Pre-Revolutionary Table

Notably, Stradley Ronon Partners John C. Hook and Stephanie E. Sanderson-Braem represented a client in a record-setting auction sale of a rare pre-revolutionary pie-crust table attributed to the Garvan carver, which dates back to the early 1760s. Auctioned by Christie's, the antique table sold for more than $6.7 million.

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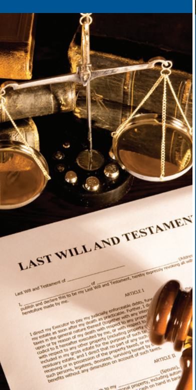
*For more information about our Trusts, Estates & Personal Planning practice, visit **www.stradley.com/trusts.***



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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.

www.stradley.com

LOCATIONS

Pennsylvania
Washington, D.C.
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