

ESTATE PLANNING AND PRIVATE CLIENT

Comprehensive Estate Planning & Private Client Services

Kaplin Stewart's Estate Planning and Private Client practice delivers comprehensive strategies to help clients throughout all stages of their lives. We serve as trusted advisors to clients from all walks of life, including high net worth individuals, families and businesses. Our lawyers concentrate on developing individualized solutions that help our clients manage and protect their assets, property and businesses today and in the future.

Our attorneys offer a wide range of services to help our clients meet their estate planning and wealth management goals, including:

- **Estate & Trust Planning.** Our attorneys counsel clients through all aspects of estate and trust planning. We use a full array of legal tools to develop comprehensive estate plans that give our clients the protections and peace of mind they are seeking.
- **Asset Protection Planning.** Our firm is well-equipped to assist clients with the full range of asset protection planning matters. Many of our lawyers hold advanced degrees in tax law and develop customized asset protection plans that minimize risks and avoid unnecessary tax liabilities.
- **Business Succession Planning.** Transitioning or winding down a business is a complicated process that requires advanced planning so that your future goals and desires can be achieved. Our attorneys take a process-oriented approach to help clients structure business succession plans that fully address the unique needs and demands of their companies.
- **Wills & Trusts.** We take a personalized approach in wills and trust matters. We work with individuals and families to develop the legal documents they need to ensure that their property and personal belongings are protected and transferred according to their wishes.
- **Estate & Trust Litigation.** Our attorneys understand that estate and trust litigation can be extremely difficult and emotionally taxing for our clients. When issues and conflicts surface, our estate and trust litigation team

explains all options available to our clients so that they can choose the right path for their individual situations.

- **Estate Administration.** We appreciate that estate administration matters can sometimes be confusing and overwhelming. Our attorneys steer clients through the complex processes and legal requirements associated with probate and estate administration.
- **Special Needs Trust.** The attorneys at our firm carefully navigate clients and their loved ones through all aspects of special needs trusts. We develop long-term relationships with our clients, providing legal services that are tailored to their unique and often-changing circumstances.
- **Estate and Trust Tax Planning.** Our attorneys have extensive experience helping clients address sophisticated tax planning issues associated with estates and trusts. We draw upon our in-depth knowledge of tax law and the business world to deliver practical solutions that achieve our clients' goals while minimizing tax consequences and liabilities.
- **Charitable Planning.** Our attorneys are adept at helping clients contribute to the charities and causes that are most important to them. Our team works to develop creative plans and strategies that reduce potential tax consequences while achieving our clients' charitable objectives.
- **Prenuptial Agreement.** While no one gets married expecting to later divorce, marriages do end. Our attorneys work with clients to develop prenuptial agreements that address each spouse's rights to property, assets and income in the event the marriage terminates.

Contact an Estate Planning Attorney Today

While planning for the future is easy to put off, it is essential to take the appropriate steps now to manage and preserve your wealth today and for future generations. Our team of attorneys have extensive knowledge in estate planning, business and tax matters to help you create plans that meet your personal and business needs.

Learn how our attorneys can help you advance your personal and business objectives. We encourage you to schedule a consultation today. We service our clients and their businesses with offices in Philadelphia and Blue Bell, Pennsylvania as well as Cherry Hill, New Jersey. Contact us online or by phone at 610-260-6000 today to arrange a consultation.