Kaplin Stewart
Attorneys at Law

PRIVATE CLIENT BUSINESS AND INVESTMENT ADVISORY SERVICES

Personal wealth is often inextricably tied to the businesses or other enterprises that generate it. As a business law firm, we understand the nuances of the business and professions that generate wealth for our clients. This puts us uniquely in tune with their individual needs and requirements. Our diverse private clients include many highly successful individuals in real estate, finance, IT, health care and life sciences, as well as the medical and legal professions.

A One-Stop Shop for Business and Personal Wealth

Clients entrust us with more than their business – for them, it's personal. We provide customized, hands-on service for the personal finances of business owners, entrepreneurs, and key partners. Our focus is on taking care of you. We do this by building a close, trusted relationship. We develop a deep understanding of our clients' situations, and we create comprehensive services that help them meet their goals – now and in the future.

Business, Tax and Asset Protection Planning

We help private clients invest, divest and restructure their business holdings. We review their tax situations on an annual basis while implementing asset protection strategies, wealth transfer programs, and inheritance planning procedures. As a team of tax professionals with relevant experience (Masters in Tax, CPA and IRS Chief Counsel experience), we can fully support the business lifecycle from the private client personal side by advising on business entity structuring, capital investment, the design and implementation of equity-based compensation plans and retirement plans. And when the time comes to sell an investment or family enterprise, we can provide appropriate M&A counsel.

Business Trusts and Estates

We understand that good business planning should never be divorced from good estate planning. We design and administer individualized plans to minimize the impact of gift, estate, and generation-skipping taxes. Incorporating sophisticated strategies such as Family Limited Partnerships (FLPs), Limited Liability Companies (LLCs), Grantor Retained Annuity Trusts (GRATs), and other trust vehicles, our team of professionals apply the utmost discretion to every situation.

Succession Planning

Identifying and readying the next generation of leaders for a private company is critical to business continuity and long-term growth. Whether succession comes from within a client's family or through their current management structure, we analyze their business and generational needs, implement transitional management programs, and negotiate and prepare business ownership agreements with their successors.

Consultative Advice

We assist clients in business enterprises of all size. Likewise, the personal needs of our clients vary, and we are asked to review agreements and assess situations of all types, including commercial leases, employment and consultant agreements, severance agreements, non-disclosure agreements, equity-based compensation and option agreements, shareholder agreements, partnership agreements, buy-sell agreements, loan documents, personal guarantees, private placement subscription memoranda, and investment agreements.

Contact an Estate and Trust 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 your personal and business needs 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.