

## Estate Planning and Administration

The attorneys on our Estate Planning and Administration team provide straightforward advice and design estate and business succession plans tailored to meet the unique needs of the clients we represent.

Our clients range from young families just starting out and in need of a basic estate plan to business owners and executives who have built considerable wealth and require a more sophisticated solution to transition their life's work to the next generation in a thoughtful and tax-efficient manner.

We offer the area's largest team of attorneys and paralegals dedicated exclusively to the areas of estate planning and administration, business succession planning, charitable planning, and related areas of the law. Koley Jessen was named among the "Best Law Firms" by U.S. News & World Report and Best Lawyers, who gave it a Tier 1 Ranking for Trusts & Estates and Tax Law, based on our extensive experience and expertise in these fields.

**Estate Planning:** We work closely with our clients and their other professional advisors to design, prepare, and implement estate plans that are customized to meet their unique objectives.

**Estate and Trust Administration:** We serve as legal counsel to executors and trustees to guide them through all aspects of the post-death estate and trust administration process, including probate proceedings at the county court, document interpretation, preparation of estate and inheritance tax returns, interfacing with taxing authorities, post-death tax planning opportunities, and estate settlement and distribution.

### PRACTICE CONTACT

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### PROFESSIONALS

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### RELATED AREAS

Business Succession Planning  
Nonprofit and Tax-Exempt Law  
Tax

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**Estate and Trust Disputes:** We represent fiduciaries and beneficiaries involved in will and trust contests, will and trust construction and reformation suits, and other forms of estate and trust litigation.

**Charitable Planning and Nonprofit Organizations:** We help clients identify and define their charitable objectives and then implement a plan for carrying out those intentions. Oftentimes, this involves the creation of charitable trusts or nonprofit corporations. Typically, we then continue to serve as legal advisors to these entities to assist with fulfillment of their mission and preservation of their tax-exempt status, as well as compliance and operational matters.

**Business Succession Planning:** We provide comprehensive succession planning counsel to closely held business owners to help create and preserve value in the business and then to design and implement a strategy for its transition—whether that transition occurs through a planned transfer of ownership to family members, management, or a third party or as the result of the unexpected death or disability of the owner.