TRUST, ESTATES AND SUCCESSION PLANNING

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Our attorneys at O'Neil Cannon have advised and represented generations of clients in sophisticated, long-term planning for their families, their businesses and their charities.

We work collaboratively with our colleagues in the areas of tax, real estate, mergers and acquisitions, business law, family law, and litigation to provide full-service and creative solutions. In this way, we are able to serve as "general counsel" to families and their businesses, helping coordinate their needs across multiple issues and legal disciplines.

Estate Planning

We have extensive experience tailoring estate plans designed to fit our clients' needs. We provide a full range of services to our clients, including sophisticated planning to achieve tax-efficient results and protect our clients' assets for them and their families. Our clients know they can depend on our experience and wide range of services to help them achieve their objectives today and for generations to come.

Trust and Estate Administration

We work with our clients at every step of the trust and estate administration process. Our attorneys frequently advise personal representatives, trustees, agents, and guardians regarding all aspects of their fiduciary duties. Moreover, we regularly prepare complex estate, trust, gift and income tax returns on behalf of personal representatives and trustees. We also provide advice and support on such matters to our clients, their accountants, and other professional advisors.

Business Succession Planning

Our attorneys understand that deciding whether to transfer ownership of a family business to the next generation is one of the most important, and most difficult, decisions our clients face. Many decisions must be made. Will ownership of the business be transferred to family members, employees, or an outsider buyer? Who will manage the business? Our succession planning attorneys manage these issues by facilitating a smooth transition to the future owners of the business and utilizing sophisticated techniques to achieve maximum tax benefits.

Tax Controversies

We are experienced advocates for our clients in federal, state, and local tax disputes involving audits (including challenges to asset valuations), appeals, and court proceedings. We frequently work alongside our clients' accountants and other trusted advisors in tax disputes because we believe the best results are obtained through collaborative efforts.

Charitable Planning

We strive to carefully understand our clients' needs and assist clients in achieving their philanthropic objectives. Our attorneys are experienced in all types of charitable planning. We coordinate lifetime gifting strategies with estate planning documents to achieve continuity of management and tax savings over several generations.

Fiduciary Representation

Trustees and personal representatives rely on our substantial experience in representing fiduciaries. We advise our clients on properly carrying out the terms of a trust or will to achieve desired administrative objectives, and manage relationships with beneficiaries to avoid to conflicts of interest and claims for breach of fiduciary duty.

Probate

Our attorneys and support staff assist clients through all of the complications of the probate process to make the administration efficient.

Inheritance Litigation and Will Contests

Inheritance disputes arise in many ways—trust disputes, will contests, breach of fiduciary duty claims, lack of capacity or fraud claims, business and asset valuation disputes, trustee or personal representative removals, disputes between personal representatives or trustees and beneficiaries, and power of attorney disputes. Our team includes experienced litigators who specialize in inheritance disputes and trust and estate planning attorneys who have a keen understanding of the critical issues our clients face, and we regularly develop creative solutions to a dispute.

Marital Property Agreement (Prenups and Postnups)

We have extensive experience in planning and drafting prenuptial and postnuptial agreements to suit the interests of our clients and afford them with both tax and non-tax benefits.

Fiduciary Services

After working hard to build your wealth and taking time to work with your attorney to create a customized estate plan, you want to be sure your final wishes are properly carried out. You want to choose expert, trusted professionals to protect, preserve, and distribute your wealth according to your wishes. This is where our fiduciary services team fits in.Lawyers
a:10:{i:0;s:3:”232″;i:1;s:5:”16269″;i:2;s:5:”16582″;i:3;s:5:”17974″;i:4;s:3:”246″;i:5;s:3:”247″;i:6;s:5:”11305″;i:7;s:5:”17105″;i:8;s:3:”236″;i:9;s:5:”16709″;}