



NORRIS McLAUGHLIN
ATTORNEYS AT LAW

Estate Planning & Administration

Norris McLaughlin estate planning & administration lawyers have vast experience in all aspects of state, federal and international tax law, with a particular emphasis on the planning and administration of trusts and estates. Our goal is to assure that assets pass to the intended beneficiaries at as little cost as possible, including minimizing state and federal tax burdens which may require the use of sophisticated and creative planning techniques.

Our estate planning and administration services include:

Estate and Tax Planning

- Draft wills, trust agreements, powers of attorney and living wills
- Structure lifetime gift-giving programs to maximize use of annual and lifetime transfer tax exclusions and minimize transfer tax costs
- Plan for the succession of family businesses to younger generations
- Establish charitable trusts and foundations
- Plan for the disposition of insurance proceeds and retirement plan benefits

Estate and Trust Administration

- Coordinate the probate of wills and the valuation and collection of estate assets
- Make distributions of assets and provide additional support to beneficiaries
- Prepare estate, gift, generation-skipping, income, and inheritance tax returns
- Handle federal estate tax audit and state inheritance proceedings
- Represent clients before the Internal Revenue Service and the U.S. Tax Court
- Post-mortem tax planning
- Probate litigation – will contests, interpretations of wills and trusts, guardianship issues

At Norris McLaughlin, our trusts and estates, immigration, and family law attorneys have worked together to develop the specialized documents and processes needed to protect undocumented individuals and their families, a sort of Deportation Family Protection Package. We can assist you to provide legal authority for a caregiver for medical and educational purposes, to appoint a standby or temporary guardian for your child, and to ensure your assets and your children's assets are protected.

