Asset Protection Planning

Our asset protection planning services bring to bear proactive and customized strategies to help individuals and families safeguard their wealth for the future. We work closely with clients to understand their unique financial circumstances and develop a plan to shield assets from potential creditors, lawsuits, and unforeseen liabilities. This may include the strategic titling of various assets, the establishment of irrevocable trusts, the identification of potential exemptions, the separation of personal assets from business liabilities for business owners, and other asset protection devices that may be appropriate to integrate with your overall estate plan. Our approach to asset protection is comprehensive and employs a long-term perspective that anticipates potential future risks.

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Experience

Representative Matters

- Designed and implemented advanced estate planning strategies for a high-net-worth client, removing more than $40 million in assets from the taxable estate.

Insights & More

Client Alerts

Wealth Transfer Strategies to Consider in the Age of COVID-19
6.09.20