COSGRAVE
VERGEER KESTER

Estate and Trust Planning

There is no cookie-cutter approach to estate, trust and tax planning, because no two people or organizations are alike. That's why our estate and trust planning lawyers collaborate with clients and their financial advisors to develop customized solutions to meet each client's unique needs.

Our attorneys work with high-net-worth individuals, families, and closely held businesses to map out strategies that safeguard assets and maximize tax savings. We keep up with constantly changing tax laws affecting different income sources and industries, so that you don't have to. Our services include the following:

- **Business formation, management, and succession planning.** Family limited partnerships, limited liability companies, buy-sell agreements, and corporate reorganizations.
- **Estate planning and administration.** Probate and trust administration, including will and trust disputes; post-mortem tax planning; preparation of estate tax returns, gift tax returns, and trust and estate fiduciary income tax returns.
- **Wills and revocable living trusts.**
- **Insurance trusts.** Single life and joint and survivor policies, traditional trusts, and split-dollar arrangements.
- **Gift planning and trust preparation**. Straight gifting; generation-skipping tax planning; minors' and support trust grantor-retained annuity trusts and unitrusts, qualified personal residence trusts, defective grantor trusts, private annuities; and installment sales.

INDUSTRIES

Beverage

Construction

Estate Planning

Healthcare

Hospitality

Manufacturing

Professional Services

Real Estate

ATTORNEYS

Jake W. Reimer

Deanna L. Franco

Charles J. Huber

To get started, please fill out the Estate Planning Questionnaire and send it to Jake Reimer at jreimer@cosgravelaw.com