



Hanson Bridgett Practice Group Estate Planning & Administration

We provide comprehensive estate planning, probate and trust administration services. Our attorneys understand that every client's personal, family and economic goals are unique. We "get inside" the client's particular situation, provide counsel, and recommend planning to achieve the client's objectives.

All individuals and families, regardless of their assets, will benefit from a carefully planned and drafted estate plan. With a proper estate plan, an individual can provide for his or her health care and property management needs in the event of incapacity, control the disposition of his or her assets upon death, facilitate estate and trust administration, and minimize transfer taxes (gift tax, estate tax, generation-skipping transfer tax). We deliver innovative approaches to help our clients meet these needs in a manner that is tailored to each individual.

The estate planning attorneys at Hanson Bridgett specialize in the use of more sophisticated techniques for large or complex estates. We have particular expertise in crafting specialized trusts and techniques, such as grantor retained annuity trusts (GRATs); qualified personal residence trusts (QPRTs); gifts, sales and loans to intentionally defective grantor trusts (IDGTs) to achieve tax-saving and non-tax planning objectives; establishing family limited partnerships and limited liability companies to transfer personal and business assets to the next generation without interruptions in business and with reduced transfer tax. Relatedly, we have a keen understanding of the effectiveness of planned charitable giving techniques, such as charitable

remainder trusts and charitable lead trusts, to preserve and transfer assets to the family while also supporting charitable organizations.

In addition to the group's focus on comprehensive estate planning, the members provide probate and trust administration services to ensure the efficient and effective post-mortem implementation of the estate plan.