



# Hanson Bridgett Practice Group Family Wealth Planning

For more than 60 years, Hanson Bridgett has helped clients realize their goals related to managing and protecting assets via thoughtful and tailored legal advice spanning all aspects of family wealth. Hanson Bridgett's lawyers guide clients in areas such as formulating a comprehensive estate plan, succession planning for family businesses, providing for future generations, protecting vulnerable family members, mitigating taxes where appropriate and planning for charitable giving.

We understand that each client's situation is unique, and we work closely with individuals and families to help devise a plan that addresses their distinct values and priorities. Our services extend far beyond drafting the basic documents that comprise an estate plan; rather, we develop ongoing relationships with our clients, advising them through changes in tax laws, as well as changes to their lives and priorities, all while helping them navigate family dynamics and other interpersonal challenges inherent in this area of the law.

## OUR SERVICES

We are versatile in tailoring a plan that is both flexible and suited for each client's particular stage in life, whether planning for a young family, guiding founders through a liquidity event or revisiting priorities as clients welcome grandchildren. We then assist in implementing the plan as a client moves through the stages of life and following death.

We have extensive experience in estate, gift and income tax planning, as well as considerable experience with complex assets, including pre-IPO stock, equity compensation awards, carried interest, concentrated real estate holdings and family businesses. We also regularly counsel clients with unique family situations, such as blended family households.

When the time comes, we assist families with post-death trust and estate administration. We assist our clients as they follow the road map created under the trust agreement, including advising trustees on their fiduciary duties, guiding trustees with respect to the transfer of assets and preparing estate tax returns and other documentation to comply with ever-changing tax laws.

Regardless of the circumstances, we work collaboratively with our clients, their families, our colleagues and outside advisors as necessary to formulate creative and thoughtful approaches to planning for and protecting family wealth and for putting those plans into action.

#### OUR CLIENTS

Our clients include families that our firm has counseled for generations, ushering them through the shifts in local, state, federal and international tax laws. A growing segment of our clientele include those in the sectors of technology, venture capital and private equity, as well as clients who are not U.S. taxpayers or have an increasingly global presence. These situations require sophisticated tax and estate planning, which we provide in collaboration with our firm's tax group and counsel in foreign jurisdictions.