



Estate Planning

Preserving Your Legacy

Estate planning should never be an afterthought; it's a vital aspect of preserving your legacy and ensuring your family's future is secure. At Kilpatrick, we recognize that your wealth, assets, and business interests reflect your life's work. Our mission is to craft estate plans that honor your legacy and ensure a smooth, tax-efficient transition of your wealth to the next generation. We are committed to creating strategies that are as unique as the individuals we serve.

Reach

Our services extend beyond traditional estate planning to include a comprehensive suite of strategies tailored to the needs of closely held business owners and their families. Recognizing the unique challenges and opportunities presented by such enterprises, we are dedicated to developing succession plans that ensure business continuity while aligning with your broader estate objectives. This includes crafting intricate LLC operating agreements, partnership arrangements, and shareholder buy-sell agreements, all designed to safeguard your business's future and its role within your estate.

Approach

We take a holistic approach to estate planning, providing the full spectrum of tax and corporate law to provide you with a cohesive plan. Our advanced tax planning techniques are aimed at minimizing your tax burden while maximizing the benefits to your heirs. Our multidisciplinary team works collaboratively to address every facet of your estate, ensuring that your legacy is preserved and your family is protected for generations to come.

Areas of Focus:

- Revocable Trusts
- Estate Tax and Income Tax Mitigation Planning
- Pre-Sale Business and Tax Planning
- Sales to Defective Trusts
- Insurance Planning
- Business Succession Planning
- Beneficiary Defective Trusts
- Grantor Retained Annuity Trusts
- Private Annuities

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