

ESTATE PLANNING, PROBATE AND TRUSTS

The lawyers in the Ervin Cohen & Jessup LLP Estate Planning, Probate and Trust Department work closely with clients to identify and achieve their goals, from conserving and transferring family wealth to preserving family businesses, real estate and other assets, all while minimizing administrative costs and taxes. Our clients include individuals, families, businesses and fiduciaries, and our lawyers are regularly involved in planning and administering estates of all sizes.

Estate Planning Related Services

Estate planning techniques vary as the tax laws change. Drawing on the considerable tax and accounting expertise available in our firm, we closely monitor these changes and then tailor our clients' estate plans with care, always keeping their particular goals in mind, using:

- Revocable living trusts
- Wills with testamentary trusts
- Optimal marital deduction planning
- Personal residence trusts
- Irrevocable life insurance trusts
- Charitable giving programs, including the use of charitable lead and remainder trusts and private foundations
- Generation-skipping transfer tax planning techniques
- Estate valuation freezing plans
- Analysis of available discounts in valuing business and real estate assets
- Family general and limited partnerships and limited liability companies
- Sophisticated gift planning, including non-commercial or private annuities and grantor-retained annuity trusts (GRAT's)
- Retirement funding
- Durable Powers of Attorney and Advance Health Care Directives

Estate Administration

The Department also handles all aspects of estate (probate) and trust administration, including opportunities for "post-mortem" estate planning with the use of disclaimers, asset allocations, intra-family sales, tax elections

PROFESSIONALS

Siobhan C. Amin
Juliet M. Burton
Colleen Calkins
Reeve E. Chudd
Allan B. Cooper
Geoffrey M. Gold
W. Edgar Jessup, Jr.
Randall S. Leff
Kimberly D. Lewis
Jeffrey A. Merriam-Rehwald
Gary Q. Michel
Amy S. Russell
Melvin S. Spears

and other techniques to achieve optimal income, estate and gift tax results and to implement family needs and goals.

Dispute Resolution Representation

Finally, we regularly advise and represent individual and corporate fiduciaries regarding their fiduciary duties, and handle negotiation, mediation and litigation among estate and trust beneficiaries and fiduciaries, as well as estate and gift tax audits, appeals and litigation with the Internal Revenue Service.

SUCCESSSES

Ervin Cohen & Jessup Expands Recognitions on the U.S. News – Best Lawyers 2022 “Best Law Firms” List

Ervin Cohen & Jessup Expands Recognitions on the U.S. News – Best Lawyers 2021 “Best Law Firms” List