



## WILLS, TRUSTS & ESTATES

### PREPARATION OF WILLS AND TRUSTS

### ESTATE PLANNING

### HEALTH CARE POWERS OF ATTORNEY

### WEALTH PRESERVATION

### PROBATE ADMINISTRATION

### TRUST ADMINISTRATION

### MEDICARE TRUSTS

### SPECIAL NEEDS TRUSTS

### SUCCESSION PLANNING

### PRACTICE MEMBERS

EDWARD D. FELDSTEIN  
R. JEFFREY KNISLEY  
RONALD C. MARKOFF  
KARENANN MCLOUGHLIN

The firm's Wills, Trusts & Estates team represent a wide variety of clients. From helping young families in need of a first will, to assisting owners of closely held businesses design and implement complex business succession and estate plans, our attorneys provide customized estate planning and wealth transfer strategies tailored to each individual's unique situation

We work closely with our clients' accountants, financial planners and insurance brokers to create an integrated plan that achieves our clients' financial goals, securing the maximum benefit for our clients, their families and their chosen charities.

Our Wills, Trusts & Estates team also represent fiduciaries in probate matters, including guardianship and estate administration. We also administer revocable and irrevocable trusts and we advise several charities and charitable foundations.

### REPRESENTATIVE TRANSACTIONS, DEALS OR MATTERS

- Served as a guardian-ad-litem in connection with Superior Court approval of the early termination of a trust with a corpus in excess of \$100,000,000.
- Assisted several high net worth families in overseeing the execution and administration of qualified personal residence trusts, limited liability companies, and other gift mechanisms in order to pass ownership of vacation homes to the next generation.
- Developed, post-mortem, estate plan resulting in asset restructure to avoid estate taxes upon subsequent death of surviving spouse.
- Prepared special needs trust for parents of developmentally disabled child to ensure that the state would not count trust property as resources of such child rendering the child ineligible for Medicaid benefits.
- Prepared wills for husband and wife creating separate testamentary trusts for each of their children with periodic distributions to their children as they reached adulthood.