

Trusts and Estates

Why Choose Schnader?

The attorneys of Schnader's Trusts and Estates Practice Group provide sophisticated legal services to individuals of high net worth, owners of family businesses, corporate executives, fiduciaries and charitable organizations in a variety of areas. We offer these services in an integrated way, providing personal, focused attention while making use of the broad array of knowledge and sophistication available from our Firm's litigation and transactional lawyers on a case-by-case basis, as needed.

Estate Planning and Asset Protection

Our lawyers are conversant in every aspect of sophisticated planning of gifts, trusts and estates. We employ a broad range of techniques that enable us to tailor our clients' estate plans to their specific needs, including but not limited to:

- Tax-sensitive wills,
- State-of-the-art trusts (such as QPRTs, GRATs, grantor trusts and revocable trusts),
- Family limited partnerships,
- Limited liability companies,
- Business executives packages, and
- Corporate benefits packages.

Moreover, businesses engage us to provide such services to their executives.

We also advise our clients regarding asset protection, planning for the possibility of incapacity and the sensitive area of health care decision-making.

Family Business Planning

Representation and counseling for owners of family- and closely-held businesses is an important part of the Trusts and Estates Practice Group's services. We help our business clients integrate personal, financial, and estate planning with bottom-line needs, including business succession planning and business counseling.

Our Lawyers Understand the Entrepreneur's Perspective

Our close "partnering" with our entrepreneurial clients is particularly rewarding as we play an important role in their growth, success and ability to overcome obstacles. Our lawyers understand the specific need of small businesses for quick, practical, creative and cost-effective advice. We have the experience to interact effectively with entrepreneurial personalities and communicate with them in a straightforward way.

Our lawyers are able to draw on the broad range of resources within Schnader to provide our entrepreneurial clients with a variety of traditional business services such as in the areas of corporate law, contracts, leases, zoning, land use and other real estate issues and taxes.

We also are leaders in providing legal services in a number of areas that are increasingly affecting small businesses and their owners, such as labor and employment relations; employee benefits, including pensions and profit sharing; Internet and computer issues; and intellectual property, such as copyrights and trademarks.

A Wide Spectrum of Dispute Resolution Services

Schnader lawyers have extensive experience in mediation, arbitration and other alternative dispute resolution, as well as more formal litigation, in areas ranging from banking, lending, creditors' rights and bankruptcy to bidding regulations, franchise law and family law, including divorce, support, child custody and property distribution law.

Charitable Planning

We are highly conversant in the complex area of charitable giving and have extensive experience in the creation of charitable remainder trusts, charitable lead trusts and private foundations. We provide ongoing representation to a variety of private foundations, ranging from some of the largest in the country to small

family foundations.

We also represent numerous hospitals, schools and other institutions on a variety of matters, including gifts, bequests and planned-giving vehicles, such as pooled income funds and charitable gift annuities.

Trust and Estate Administration

Our trusts and estates lawyers, together with a team of top-notch fiduciary accountants and paralegals, administer a broad array of significant estates, trusts and private foundations. Our own trusts and estates accounting unit handles all administrative details promptly and efficiently. We have developed long-standing relationships with a variety of trust and banking institutions and maintain a custody arrangement for our accounts with a major national bank.

Leadership in the Community

Schnader's trusts and estates attorneys serve in leadership positions in major bar and professional organizations including:

- American College of Trust and Estate Counsel
- Executive Committee, Rules & Practice Committee, Public Interest Law Committee and Tax Committee of the Probate and Trust Law Section, Philadelphia Bar Association
- Pennsylvania Joint State Government Committee
- Section of Real Property, Probate and Trust Law of the American Bar Association
- New York State Bar Association, Trusts and Estates Law Section

Our trusts and estates lawyers lecture frequently on estate and charitable planning to other lawyers, nonlegal professionals and private groups. In recent years, we have participated in significant seminars and workshops on planned giving and fiduciary tax law changes.

Contacts

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