

# McNees Estate Planning Group

Our estate planning law attorneys work with clients and their other professional advisors to develop customized estate plans that reduce taxes, preserve assets, and carry out legacies.

## We are experienced in preparing estate planning documents, including:

- Wills
- Powers of Attorney
- Health Care Directives
- Revocable and Irrevocable Trusts
- Irrevocable Life Insurance Trusts
- Grantor Retained Annuity Trusts
- Intentionally Defective Grantor Trusts
- Asset Protection Trusts
- Qualified Personal Residence Trusts
- Charitable Remainder Trusts
- Charitable Lead Trusts
- Family Limited Partnerships

## Business Succession Planning

In formulating an estate plan, a family business is often the most valuable asset. McNees estate planning law attorneys have a long history of representing business owners and entrepreneurs. Our firm has spanned generations, and so has our succession planning practice.

Recognizing that succession planning is a complex process involving tax planning, legacy planning, and family dynamics, we believe that a team approach delivers the best result to the client. Our estate planning law attorneys coordinate with members of the firm's other practice groups, as well as the client's other professional advisors, to deliver a superior planning result.

## Our work in this area includes:

- Preparing "Buy-Sell" Agreements
- Compensation planning for business owners and key executives
- Preparing "Family Constitutions" and other legacy-oriented documents
- Providing advice on liability management and creditor protection
- Life insurance planning
- Planning to minimize estate tax and income tax
- Developing tax-efficient exit strategies

## Estate and Trust Administration

McNees has significant experience in estate and trust administration matters. Our estate planning law attorneys and paralegals provide efficient and cost-effective representation to executors and work with the executors' other professional advisors to gather and value estate assets, pay debts, and prepare federal estate tax returns and Pennsylvania inheritance tax returns.

Many estate plans involve trusts, and our attorneys work with corporate and individual trustees and beneficiaries to advise them on their rights and responsibilities. These services include income tax planning, interpretation of trust agreements, and preparation of non-judicial settlement agreements.



### Non-Profit Organizations

Our estate planning law attorneys represent a wide variety of public charities and private foundations, including educational institutions, hospitals, social welfare organizations, community foundations, and trade associations. We provide advice on the formation, acquisition, and maintenance of tax-exempt status, joint ventures with for-profit entities, and internal governance issues. We represent charities in fundamental transactions, such as mergers and asset sales, that involve the often-complex interaction of federal tax laws and state laws governing non-profit entities.

### Litigation

We represent executors, trustees, and beneficiaries in all facets of litigation, including trials, injunction proceedings, arbitrations, and mediations. Our experience includes defending and prosecuting surcharge actions, will contests, elective share claims, guardianships, cy pres matters for charitable organizations, and proceedings to interpret and reform wills and trust agreements.

## The McNees Estate Planning Group

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