

RCB | LAW

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ESTATE AND BUSINESS PLANNING

Estate Planning:

- Estate tax analysis and implementation of planning to minimize or avoid the estate tax
- Estate planning preparation
 - Drafting of revocable trusts
 - Drafting of wills
 - Drafting of durable powers of attorney
- Advanced estate planning
 - Irrevocable trusts
 - Use of life insurance
 - Estate tax payments planning
- Charitable planning
 - Charitable remainder trusts
 - Charitable lead trusts
 - Direct charitable gifts
- Special Needs Planning
- Post mortem planning and administration
 - Estate tax returns
 - Allocation agreements for irrevocable trusts
 - Transfer of assets
 - Exchange agreements
 - Implementation of estate planning provisions
 - Collateral areas of settling estates
 - Disclaimer Trusts
 - Generation Skipping Transfer Trusts
- Probate
- Conservatorships

Business, Agri-Business Planning:

- Entity choice and implementation (corporation, limited liability company, partnership)
- Succession planning
 - Buy/Sell agreements
 - Sales to third parties
 - Succession among family members
- General business counseling
- Lease arrangements
- Compliance on entity choice
- Overall tax planning
- Sale/Purchase of business
- Special Use Valuation for Family Farms and Ranches
- Estate Tax Coordination with Family Businesses
 - Long-term payout of estate taxes
 - Transfer to Qualified Heir(s)
 - Succession among family members
 - Discounts to reduce estate tax Liability