Private Clients and Estate Planning

Practices and Industries

PRIMARY CONTACTS

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Our Private Client Group attorneys provide a unique service to the firm's high net worth families and their closely-held businesses. Our approach permits our clients to work intimately with a small group of trusted advisors who have access to the resources and experience of an international law firm. We integrate sophisticated family wealth planning, estate and tax planning, and business planning with a variety of other legal services. Our comprehensive approach provides our clients with efficiencies and economies of scale, and ensures an integrated analysis of their family, financial, and business issues. It also assures our clients and their families of a consistent source of guidance and support with respect to their planning matters.

Many of our most enduring relationships involve three or four generations, and clients with multiple layers of trusts, one or more charitable foundations, and numerous business activities and interests. We can provide the necessary sophisticated planning, but we are also sensitive to and experienced with the family and personal issues that are important to our clients.

Our primary practices include Family Wealth and Estate Planning, Trust and Estate Administration, and Tax-Exempt Organizations and Private Foundations.

Family Wealth and Estate Planning

Our attorneys counsel individuals, entrepreneurs, family businesses, and families of substantial wealth regarding estate planning and wealth preservation, as well as business succession issues. We facilitate clients' comprehensive planning goals, which may include the minimization of taxes, international planning, charitable gifts, retirement planning, wealth preservation/asset protection, marital property planning, and negotiating and structuring family business transactions.

Trust and Estate Administration

We represent and counsel executors and trustees in the administration and management of complex estates and trusts, as well as fiduciary litigation and other controversies. Representative matters include advice regarding the Texas Trust Code, conflict of interest issues, interpretation of ambiguous will or trust provisions, and investment decisions.

Tax-Exempt Organizations and Private Foundations

Our attorneys advise public charities, private foundations, and other tax-exempt organizations with respect to formation, recognition of tax-exempt status, governance, and operational matters.