Wealth Transfer

Estate and wealth transfer planning is essential in protecting and preserving the assets accumulated over a lifetime of hard work. Experts estimate that between 1998 and 2052, the transfer of wealth in the United States to the next generation will be in the trillions of dollars.

GrayRobinson's experienced, highly respected wealth transfer attorneys devote as much care to preserving and maximizing wealth as our clients have spent building it. We provide thoughtful, creative solutions designed to meet the unique needs and wishes of each client.

The firm's comprehensive, personal approach to planning provides clients with the peace of mind that their goals for their assets will be accomplished. Our wealth transfer attorneys ensure that family members' needs are met and that assets are protected, maximized and managed professionally. Through sophisticated estate planning, we work to reduce potential tax burdens and ensure smooth transition of wealth in even the most complex situations.

The variety and depth of experience of GrayRobinson's wealth transfer team allows us to provide clients with a strategic, big-picture approach to planning. The specialties represented on the GrayRobinson team are extensive. Many of our wealth transfer attorneys are board certified by The Florida Bar in wills, trusts and taxation, and several are certified public accountants. In addition, we assist our clients in assembling an integrated team of professional advisors, including financial consultants, insurance agents, accountants and valuation experts, to ensure that our clients leave the legacy they desire.

Efficient and effective transfer of wealth can begin during an investor's lifetime and can be tailored to work with philanthropic and other goals. Our experience extends to family business succession planning, disposition or distribution of assets upon death, and the management of property in the event of incapacity. This can be accomplished through various methods, including wills, revocable living trusts, irrevocable life insurance trusts, children's trusts, generation-skipping trusts, family limited partnerships, charitable remainder trusts, charitable lead trusts and other charitable split-interest trusts, as well as other estate planning vehicles and techniques, including non-probate assets (insurance, IRAs, pension plans and jointly held property).