

## Estate Planning

### OVERVIEW

With decades of experience serving families and businesses in the Pacific Northwest on all aspects of the transfer and preservation of wealth, we understand the dynamics that come into play when planning for the future. Each client's situation is unique. We listen and provide guidance on options to structure an estate plan and make critical decisions that are in the best interest of the family or the business. Our clients include high-net-worth individuals, young families just beginning to plan for the future, individual and corporate fiduciaries, and all types of charitable entities and foundations. We also represent families during the emotionally challenging and often complex process of estate administration and probate, adversarial proceedings, and fiduciary litigation.

#### Planning Ahead to Protect Assets

Recognizing each client has individual needs, we draft wills, revocable and irrevocable trusts, durable powers of attorney, advance directives, and other estate planning documents to give each client peace of mind in knowing how their estates will be managed, where assets and belongings will go, and who will take over their roles. We help navigate complicated family situations and ownership of multiple assets and properties, creating contingencies for what-if scenarios. When our clients move from other states, we help determine if Oregon or Washington state laws affect plans they already have in place. Bringing a well-rounded perspective and unique point of view to the table allows us to advise on tax implications of decisions being made and on both non-charitable and charitable gifting strategies.

#### Securing the Future for Loved Ones and Businesses

Every business owner should have an estate plan. We work closely with our [business succession planning](#) team that represents small- and medium-sized businesses to help our clients prepare for the future and address estate planning consequences. Neither can be done without involving the other, even if the family is, or is not, involved in the business operation.

#### Resolving Disputes and Tax Issues

We represent corporate and individual fiduciaries and will and trust beneficiaries in probate litigation and other contested matters. Having seen that family dysfunction may lead to difficult, emotional, and long-held conflicts, we address litigation issues without losing track of family considerations and the overall objectives.

Services provided within our estate planning and probate team include:

- Charitable contributions and gifting strategies
- Durable powers of attorney, advance directives, guardianships, and conservatorships
- Probate and trust administration
- [Revocable and irrevocable trusts](#)
- Simple and complex wills, trusts, and related estate planning documents
- State and federal inheritance tax returns