FINEMAN Krekstein & Harris

Estate and Business Planning

Fineman Krekstein & Harris attorneys have extensive experience in estate and business planning for individuals, including members of family groups; entrepreneurs; owners of closely held businesses; as well as CEOs and other senior executives.

The Firm's services to our clients include:

Tax Planning. The Firm's attorneys have significant experience in minimizing gift and estate taxes, income taxes, and generation-skipping transfer taxes in both lifetime and after death situations.

Lifetime Giving. We help clients maximize lifetime giving opportunities by using the annual exclusion and the gift, estate, and generation-skipping transfer tax exemptions, and by leveraging these exclusions and exemptions using sophisticated tax planning techniques.

Use of Trusts. We advise on when and whether trusts are effective to avoid taxes, probate, and creditor and other claims; and on the use of trusts in a variety of other situations.

Insurance Planning. Our attorneys have substantial experience in the uses of life insurance for business and personal planning, including funded buy-outs, leveraged purchases of insurance, irrevocable trusts, and dynasty trusts.

Charitable Giving. The Firm's lawyers counsel individuals on charitable giving techniques, including the formation and operation of charitable remainder trusts, charitable lead trusts, donor advised funds and private foundations, and the granting of conservation easements.

Business Planning. We regularly advise on issues of business continuity, family succession planning, family limited partnerships, shareholders' agreements, buy-sell agreements, estate freezes, and various tax-deferral devices. We also advise on the formation, operation and tax planning opportunities for S corporations, LLCs, and partnerships.

Retirement Planning and Executive Compensation. In counseling executives, our attorneys analyze employment benefits, stock options, restricted stock, lump sum payments, rollovers, and related tax planning matters.

Probate Litigation. Our group practices extensively before probate courts in a variety of cases involving surcharge, tax issues, will contests, and will construction matters.

Planning for Elderly. We assist in matters involving life care communities, living wills, powers of attorney, and guardianships.

Prenuptial Agreements. We prepare these agreements in appropriate situations to protect the assets of our clients and their families.

Related Attorneys

Michael H. Krekstein

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