

ESTATE MANAGEMENT

## Wealth and Health Planning

In a practice unique for its cross-disciplinary power, attorneys unite to help both individuals and their family members lay the foundation for a more comfortable future. Over the years, attuned to the more personal concerns of our clients, many of our attorneys expressed the desire that we collectively help them plan for retirement and disability. This practice evolved in response to that desire.

Because people are living longer, fuller, more active lives, early retirement planning is imperative and legal advice critical when exploring the plethora of confusing options for increasing and protecting wealth. Elections, for example, under the various IRA, benefit and retirement plans are no longer simple decisions when seeking to maximize wealth. To protect wealth, we can advise how certain offshore trusts and asset protection trusts may benefit business owners whose companies involve uninsured risk or are insured for far less than what juries can award.

With greater longevity comes the risk of disability or, sadly, loss of mental capacity. Planning for healthcare and financial management in the event of misfortune is imperative—action certain to lessen a family's suffering. Important tools in disability planning include living wills and powers of attorney for property and healthcare. We also work closely with individual trustees to review investment decisions and maximize each trust's assets. In addition, we assist family members and healthcare providers in these heart-wrenching situations, counseling on whether to provide or withhold further medical intervention—representation that demands the greatest sensitivity.

Skilled and innovative, the attorneys in this practice area can provide you the peace of mind everyone craves but surprisingly few pursue. Please call.

*Increasing personal  
wealth now will help  
ensure financial security  
later, and planning for  
disability is a responsibility  
you owe to yourself and  
your family.*

**ATTORNEYS IN  
THIS PRACTICE AREA**

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