

# COHEN, TODD, KITE & STANFORD, LLC

## ATTORNEYS AT LAW

### PRACTICE AREAS

## PRIVATE CLIENT SERVICES



Cohen Todd Kite & Stanford, LLC has a long and proud history of serving individual clients' needs. We believe that an individual's legal issues and problems are every bit as important as those of a large commercial enterprise. Our Private Client Services attorneys have a demonstrated commitment to representing individual clients in a wide array of areas including estate planning; and probate, estate and trust administration. In each of these areas, we focus on identifying the client's unique needs and circumstances, and then working with that client to fully meet the client's goals and objectives.

### A Multi-Disciplinary Approach

Frequently, individual client matters intersect with other legal areas. For example, estate planning becomes more complex if a family-owned business is involved. Likewise, a family member may be involved in a criminal proceeding or there may be a need for a guardianship. Cohen Todd Kite & Stanford practices a multi-disciplinary approach in such cases to make sure the client gets the benefit of the best strategy and the most efficient, cost-effective representation. Our attorneys in the Private Client Services Practice Group readily draw on the specialized knowledge of our other Practice Groups, where appropriate, to achieve the best outcomes and desired results for our individual clients.

### PRIVATE CLIENT SERVICES PRACTICE GROUP

**Terrence A. Mire**

**Marc W. Rubin**

**Richard D. Nelson**

**Matthew M. Kite**

**Stanley L. Stanford**

**John G. Cobey**

**James J. Chalfie**

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## ESTATE PLANNING

Few legal matters are more important to an individual than making an estate plan that fully reflects his or her particular wishes and objectives. Our team members provide a wide range of services to clients that start with identification of assets, definition of the client's particular goals, and development of a long-term plan that will fully meet the unique needs of the client. We focus on tax-advantaged asset transfer planning through appropriate estate plan measures, and avoidance of probate. Among our services are: preparation of wills, powers of attorney, living wills, trusts (such as personal residence, charitable remainder, charitable lead, and retained interest trusts), gift tax planning, and multigenerational planning.

Because our firm represents many family-owned businesses and the family members who own them, we have particular expertise in developing and implementing estate plans for the succession and transfer of family businesses from one generation to the next. Not only does our guidance help family-owned businesses negotiate the complexities that can arise, but it also promotes important tax advantaged asset transfers that protect business assets. Our attorneys also have significant experience in the negotiation and preparation of prenuptial agreements for business owners, as well as high net worth individuals.

### ESTATE PLANNING PRACTICE GROUP

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## PROBATE, ESTATE & TRUST ADMINISTRATION

Just as important as estate planning is experienced probate, estate, and trust administration. Our team represents beneficiaries, executors, administrators, guardians and trustees. We prepare and file all necessary documents with the local Probate Courts and tax authorities, as well as provide for tax planning, preparation of disclaimers, and the transfer of assets to beneficiaries. Our goal is to effectively and efficiently direct the estate through probate with a minimum of disruption to family members at a difficult time in their lives.

Where probate matters result in litigation, our team calls on experienced litigators from our Litigation Practice Group who appear frequently in Probate Courts, defending and prosecuting actions and claims. Typical cases include the successful recovery of embezzled assets for a decedent's estate; the successful defense of the beneficiary of a large estate in fraud action brought by executors; and the successful defense of a major national charity, an estate beneficiary, against a claim of tortious interference.

### PROBATE, ESTATE & TRUST ADMINISTRATION PRACTICE GROUP

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