Estates & Trusts

Trust. Knowledge. Confidence.

Offit Kurman®
Attorneys At Law

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Planning For Your Future And Beyond

WHAT WE DO

Offit Kurman's Attorneys At Law Estates and Trusts Practice Group is an experienced and trusted resource dedicated to helping you plan for the future and protect your assets. Our estate planning attorneys design personalized estate plans to help you minimize the burden of gift and estate taxes while protecting assets from the threat of potential creditors. Whether your estate and trust administration needs are sophisticated or basic, the estate planning attorneys at Offit Kurman tailor our asset protection planning services to meet your specific needs and objectives.

ESTATE PLANNING

Prepare Estate Planning Documents, including:

- Durable General Powers of Attorney
- Maryland Statutory General Powers of Attorney
- Advance Medical Directives
- Wills
- Revocable Living Trusts
- Irrevocable Life Insurance Trusts (ILITs)
- Charitable Trusts
- Qualified Personal Residence Trusts (QPRTs)
- Grantor Retained Annuity Trusts (GRATs)
- Intentionally Defective Grantor Trusts (IDGTs)
- Dynasty Trusts
- Disclaimer Trusts
- Minimization of Federal and State Estate Taxes
- Avoidance of Probate
- Proper Distribution Planning

ESTATE ADMINISTRATION

- Preparation of Probate Documents
- Preparation of Estate Tax Returns
- Preparation of Estate and Trust Income Tax Returns
- Negotiation of Disputes Among Beneficiaries
- Negotiation of Disputes Between Fiduciaries and Beneficiaries
- Representation of the Estate if Tax Returns are Audited

ASSET PROTECTION PLANNING

- Design of Asset Protection Plans
- Preparation of Domestic and Offshore Asset Protection Trusts

SPECIAL NEEDS PLANNING

An important part of our Estate And Trusts legal services is advising clients who have family members with special needs. We make sure that families are well educated on care options and proper management of assets. We are very familiar with community and government resources available for individuals with disabilities and design plans to maximize utilization of these programs. Overall, we give clients the peace of mind that comes with knowing that their special needs loved ones, of whatever age or disability, will be properly protected and well cared for throughout their lives. We assist families with:

- Special Needs Trusts
- Guardianships
- Understanding of Government Benefits and Structuring Plans that will not Compromise Access to Benefits

WHO WE DO IT FOR

Our Estates and Trusts team of attorneys represents business owners, corporate executives, professionals, and individuals who have accumulated wealth and require estate planning, estate administration, trust administration, and asset protection planning. In addition, Offit Kurman Attorneys At Law Elder Law Care Planning Practice Group represents clients who are unable to care for themselves and may require medical assistance planning.