

Trusts, Estates and Charitable Organizations

Estate Planning and Probate

Contacts

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Making It Easier for Our Clients

Most people, upon death, want their assets passed on to their beneficiaries in the most efficient manner. No one wants to create or encourage a family dispute. Yet, many people have difficulty following through on these intentions. At Garvey Schubert Barer, we make it easier for our clients to do this. We help our clients gather information, understand issues and make decisions. We explain the benefits of estate planning clearly so our clients can focus on the positive, proactive aspects of it.

To provide certainty to our clients, we often prepare a client's first estate plan for a fixed fee. We generally propose a fixed fee after an initial consultation. We do not charge for the initial meeting if a client decides not to use our firm for their estate planning.

We enjoy long-term relationships with our clients, which is important because an estate plan should be updated periodically to accommodate changes in the client's life and goals.

Benefits of Proper Estate Planning

- ▶ Ensure your estate is divided among your intended beneficiaries
- ▶ Choose the right person to wind up your affairs upon death
- ▶ Avoid family disputes over the guardianship of minor children
- ▶ Create trusts for younger beneficiaries or those with special needs
- ▶ Reduce or eliminate estate taxes
- ▶ Simplify the process of property succession upon death
- ▶ Plan for management of financial and healthcare affairs in the event of incapacity
- ▶ Protect your assets from creditors

Our Team

Our lawyers have been leaders in the development of Washington and Oregon estate laws through their respective state bar associations. We keep abreast of developments in federal and state tax laws in this area. We bring considerable knowledge and experience to bear on issues arising in complex estates, including succession planning for family businesses, international estate-planning issues, and generation-skipping transfer tax planning.

Two of our lawyers are members of the American College of Trust and Estate Counsel, and three are listed in *The Best Lawyers in America*. Two have advanced tax-law degrees. One has a hybrid estate-planning and estate-litigation practice that gives a unique perspective on dispute resolution matters.

Our lawyers are active in our community as well, serving on the boards of various charitable organizations, including the Seattle Opera Foundation and the Albertina Kerr Foundation in Portland. Our seasoned paralegals and our team of experienced legal assistants are highly committed to client service and assist us with estate and trust administration and gift and estate tax return preparation.

Range of Services Offered

- ▶ Wills, living trusts, durable power of attorney and community property agreements
- ▶ Prenuptial agreements, postnuptial agreements and cohabitation agreements
- ▶ Succession planning for family businesses
- ▶ Estate and gift tax planning and tax return preparation

- ▶ Charitable giving planning and tax-exempt organizations
- ▶ International estate planning
- ▶ Administration of trusts and estates, including probate
- ▶ Guardianships
- ▶ Advising heirs, beneficiaries and fiduciaries as to their rights, interests and obligations in an estate or trust
- ▶ Will contests and other trust and estate dispute resolution — see the Trusts and Estates Litigation section of our Web site