

Wealth Management Firms Richmond

Wealth Management Firms Richmond - Our Wealth Preservation & Estate Litigation Practice helps clients with whatever problems very much affecting the interests of an estate, as well as the preservation and creation of wealth through estate planning, administration and litigation. Dealing with your concerns, and whatever additional matters that may affect the estate without your knowledge, is our main responsibility.

Our lawyers are skilled in planning and litigation to help ensure that all problems are dealt with cost-efficiently and quickly. They work closely with you to help assess and handle all the problems that might come up to challenge your plans. Our planning litigation and planning services are based on thorough knowledge of the planning process in order to offer a net benefit for our clients.

Our company represents various leading charities, offering our services in the incorporation of societies, the establishment of charitable trusts and foundations, and offering suggestion in the administration of non-profits and charities.

We provide estate planning seminars for organizations, groups and companies. For family businesses, we provide business succession planning. Also accessible are group discount to employees or members of the same corporation or institution.

Estate Planning

We could create and prepare comprehensive strategies to help lessen taxes and other financial problems placed upon the estates. This is vitally essential to protect the beneficiaries from avoidable expenses and frustration. We likewise can provide help with plans for charitable reasons.

o Trusts

To enhance wealth creation and preservation, we advise individuals, institutions, and businesses on creating, administrating, and distributing trusts. By working with other lawyers in our company, accountants, and various business advisors to help to implement and structure trusts to help you attain your present and future requirements. Trusts are flexible, powerful tools which comprise discretionary family trusts, corporate reorganizations, estate freezes, "alter ego" and "joint spousal" trusts, asset-protection, non-resident trusts, and planning for retirement and succession needs.

o Wills Drafting

We can explore all of your alternatives in detail and thoroughly determine your requirements, prior to preparing your will. Our level of care and attention would help to ensure certainty and security for your estate and will help to guarantee that all your needs are fulfilled.

o Estate Planning for Business Owners

For businesses, we offer suggestion ranging on topics from shareholders agreements, corporate reorganizations, estate freezes and succession planning.

o Adult Guardianship - Incapacity Planning

For adult guardianship matters, our personal method is important for dependent adults and their families. The needs of these clients require a sensitive touch. Our work includes representing clients making applications for adult guardianship, and offering advice concerning the responsibilities of guardians and trustees. We assist with the use and preparation of health care directives and Representation Agreements.

Probate and Administration of Estates

Clients require timely, sound advice to offer for immediate requirements of family members, conserve estate assets, and deal efficiently with all matters of an estate. We approach the role of Administrator or Executor with the commitment demanded of this responsibility.

The proper administration of an estate consists of several steps with which we can provide assistance. We assist with locating wills; collecting, safeguarding and locating assets; preparation of papers required to obtain Court approval of your appointment as Personal Representative; income taxes and other estate liabilities; preparation and passing of the Personal Representative's Accounts; asset distributions, like land transfers; and administrating ongoing trusts for kids or lifetime beneficiaries.

Trust institutions, individuals and companies require recommendation in the administration of estates. In order to offer you with service guaranteed to be comprehensive and well-coordinated, we work alongside various professionals responsible for investments, accounting, trusts, banking and insurance.

Estate Litigation

We handle estate litigation such as challenges that arise from contested wills, the Wills Variation Act, constructive trust claims and trust variations. Our Estate Litigators represent clients in every level of court, and in alternative dispute resolutions such as mediations.

o Contested Wills and Trusts

Our experienced litigators act in disputes arising from undue influence, incapacity, improper will execution and poor drafting.

o Wills Variation

Our litigators represent claimants, beneficiaries, and estates in wills variation claims initiated by disappointed children or spouses.

o Constructive Trust Claims

Our litigators prosecute and defend estate litigation issues like for example unjust enrichment claims and constructive trust.

o Trustee Disputes

We represent pension managers, disappointed beneficiaries and trustees, in cases of dispute arising from the administration or investment by trustees, trustee compensation, and the passing of trustee accounts.

Mediation

We solve disputes connected to elderly care, estates, estate planning or incapacity, by providing legal counsel at mediations, and in some cases can act as a mediator, either by the parties directly or by counsel to the parties, before or after litigation is commenced.