Trusts and Estates

The process of designing an overall framework for transferring your assets to the next generation is a sensitive and important matter that should take into consideration several factors unique to each and every person. These factors might include federal estate tax issues involving a large or complex estate; transferring a family business; charitable giving; trust and guardian planning for young children or children with special needs; asset protection; planning for incapacity or the need for possible long-term care; or planning for blended families.

Comprehensive estate planning is not a "one size fits all" approach. It involves thoughtful strategy and consideration of these unique factors and utilizes a wide variety of legal documents tailored to your unique needs, goals and values regardless of whether your estate plan is simple or complex. An important part of this process is finding an advisor who you feel comfortable building a trusted relationship with.

Key Contacts

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Our Team

The attorneys in Saxton & Stump's Trusts and Estates Group work with clients and their families, business owners, and professional advisors to develop customized estate plans to ensure a smooth and optimal transition of assets to future generations. We also have unique experience in working with families of individuals with special needs and individuals requiring long-term care.

Our Services

In addition to personal estate planning, Saxton & Stump also serves as counsel to executors, trustees, corporate fiduciaries and beneficiaries in all aspects of the administration of trusts and estates.

Our Trusts and Estates Group offers the following services:

- Preparation of powers of attorney, living wills and health care directives
- Preparation of wills, revocable and irrevocable trusts
- Creation of a broad variety of unique and sophisticated trusts including irrevocable life insurance trusts, dynasty trusts, asset protection trusts, grantor trusts and defective grantor trusts, qualified personal residence trusts and grantor retained annuity trusts
- Planning to minimize state and federal estate tax
- Counsel business owners regarding succession planning, life insurance, family limited partnerships, limited liability companies and recapitalizations
- Assist clients in achieving charitable goals including preparation of charitable lead trusts and charitable remainder trusts
- Represent executors and trustees in all stages of trust and estate administration including probate, preparation of state and federal estate tax returns, filing of court accountings and distributions of assets to beneficiaries
- Assist families in all aspects of planning for individuals with special needs
- Counsel families of individuals requiring long-term care with respect to Medical Assistance and preservation of assets
- Represent parties seeking guardianship of incapacitated individuals

Related Services and Industries

Business, Corporate and Tax
Real Estate

- Assisting guardians involving ongoing administration of an incapacitated person's estate
- Counsel trustees and corporate fiduciaries in administration of trusts including special needs trust, interpretation of trust provisions, reformation of trusts, termination of trusts, filing of court accountings and preparation of settlement agreements among beneficiaries