

TRUSTS & ESTATES

SIMPLE AND COMPLEX ESTATE PLANNING



SAXTON & STUMP
LAWYERS AND CONSULTANTS

www.saxtonstump.com

SAXTON & STUMP

Utilizing decades of experience in Trusts and Estates, the team at Saxton & Stump works 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 working with families of individuals with special needs and individuals requiring long-term care.

YOUR TRUSTED PARTNER

The team at Saxton & Stump will become your trusted partner, helping guide you through all aspects of trust and estate planning. This is an involved and lengthy process that requires many considerations and decisions. We help to ease any associated challenges and help make the process a smooth one for all involved.



THE PROCESS

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 a wide spectrum of factors and values unique to each Saxton & Stump client. Factors may 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
- Planning for blended families

An important part of this process is finding a firm that you feel comfortable building a trusted relationship with. We tailor our approach to each individual client to build a strong relationship upon a foundation of trust. 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.

SPECIAL NEEDS AND LONG-TERM CARE

Our Trusts and Estates Group offers unique and caring expertise in working with families of individuals with special needs and individuals requiring long-term care in matters such as:

- Formation of first-party special needs trusts and third-party supplemental needs trusts
- Working with families, other attorneys, and corporate fiduciaries involving trusts arising from settlements
- Counseling corporate and individual trustees with the ongoing administration of special needs trusts including various court filings
- Assisting families seeking SSI and other benefits and guardianships for individuals with special needs
- Counseling families of seniors regarding long-term care planning, asset preservation, and Medical Assistance benefits



FOR PROFESSIONAL ADVISORS

In addition to personal estate planning, Saxton & Stump serves as counsel to executors, trustees, corporate fiduciaries, and beneficiaries in all aspects of the administration of trusts and estates. This includes initial formation of trusts, such as special needs trusts and minors' trusts; counseling trustees and corporate fiduciaries as to ongoing trust distributions; reforming or modifying trusts; terminating and concluding trusts and estates; court accountings and settlement agreements; and pursuing various court proceedings relating to trust and estate administration.

OUR SERVICES

Our Trusts and Estates Group offers the following services:

- Preparation of powers of attorney, living wills, and health care directives
- Preparation of wills and 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
- Counseling business owners regarding succession planning, life insurance, family limited partnerships, limited liability companies, and recapitalizations
- Assisting clients in achieving charitable goals including preparation of charitable lead trusts and charitable remainder trusts
- Representing 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
- Assisting families in all aspects of planning for individuals with special needs
- Counseling families of individuals requiring long-term care with respect to Medical Assistance and preservation of assets
- Representing parties seeking guardianships of incapacitated individuals
- Assisting guardians involving ongoing administration of an incapacitated person's estate
- Counseling 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

For more information on Trusts & Estates, please contact

Scott Alan Mitchell, Esq. at sam@saxtonstump.com or 717.556.1046.

SAXTON & STUMP

LAWYERS AND CONSULTANTS

PRACTICE AREAS

- › Healthcare Litigation and Mitigation
- › Appellate and Post-Trial Advocacy
- › Business and Corporate
- › Commercial Litigation
- › Construction
- › Corporate Healthcare and Life Sciences
- › Hospitality
- › Insurance
- › Intellectual Property and Intellectual Property Litigation
- › Internal Investigations
- › Labor and Employment
- › Medical Device Litigation
- › Quality Assurance and Peer Review
- › Real Estate
- › Risk Mitigation and Safety
- › Senior Care Services
- › Trusts and Estates

WHO WE ARE

Saxton & Stump is a full-service law firm serving businesses by providing legal and consulting services. We apply strategic solutions and provide problem-solving support to help our clients navigate legal issues and thrive in an increasingly complex world.

Collaboration across disciplines allows our team to provide the highest level of service. The diverse backgrounds and extensive knowledge of our attorneys, business professionals, and industry experts creates a unique resource for our clients.

At Saxton & Stump, you'll be working with a team built for excellence that provides both quick response times and high-quality work. Our initiative of staying innovative and forward-thinking in the legal industry sets us apart. We also have a strong focus on investing in our team and the community to create robust relationships.

LANCASTER

280 Granite Run Drive • Suite 300
Lancaster, PA 17601
717-556-1000

MALVERN

100 Deerfield Lane • Suite 240
Malvern, PA 19355
484-328-8500

HARRISBURG

4250 Crums Mill Road • Suite 201
Harrisburg, PA 17112
717-216-5505



www.saxtonstump.com