Wills, Trusts, and Estates

Our estate planning counsel of individuals, families, and fiduciaries includes estates and assets ranging from the relatively simple to multigenerational and complex holdings.

For individuals, families, and family-owned business entities, our attorneys create valuable strategies to minimize tax liability and prevent conflict. The establishment of private foundations is a significant practice focus.

Among the tools we recommend in the development of estate plans are:

- Charitable trusts and planned gifts
- Irrevocable trusts
- Life insurance trusts
- Living trusts (inter vivos)
- Marital agreements – pre and postnuptial
- Pour-over wills
- Special needs trusts
- Testamentary trusts

Clients receive legal guidance from tax specialists and leading authorities on estate planning, charitable gift planning, retirement planning, gift taxes, business succession, and intergenerational transfers of wealth.

Achieving Clients' Goals

One measure of the success of an estate plan is its strategic and financial strength. An equally important goal is for our clients to fully understand and feel comfortable about their estate plans. McGlinchey helps clients achieve both of these results by providing individualized counsel and in-depth knowledge of wealth management.

Additionally, our attorneys counsel executors and trustees in connection with the administration of, and representation in, tax audits and the preparation of gift and estate tax returns. Related services we provide include advice and counsel on tax planning, elder law, wills and trusts, and probate.

From drafting wills and durable powers of attorney to counseling on trust management and representation in will contests, McGlinchey's customized counsel results in long-term protection and certainty.

Elder Law

Experienced in assisting individuals and families to anticipate and resolve elder law issues, McGlinchey attorneys advise on, draft, and plan a range of strategies and legal structures, including:

- Disability and Long Term Care Planning
- Durable Power of Attorney
- Healthcare Power of Attorney
- Gifting Strategies
- Guardianship and Conservatorship
- Living Wills
- Medicare Eligibility Planning
- Property Ownership Transfers
- Surviving Spouse Issues
- Trust Planning
- Trust Management
- Wills

When advising clients, we consider the ability of each legal and financial strategy to minimize tax liabilities, maximize security, and dispose of assets according to each client's intentions. Our counsel is comprehensive and compassionate and conducted by attorneys sensitive to the emotional context associated with this life stage.

Initial Contacts

- Kathy Conklin
- Paul S. Leonard

Related Services

- Tax

- Corporate and M&A