PALEY ROTHMAN
ATTORNEYS AT LAW

Estate Planning

Paley Rothman's estate planning group recognizes each client's individuality. We listen closely to our clients' goals and questions, ask our own questions, and discuss the various options to accomplish our clients' goals. We discuss planning for the disposition of assets upon death, naming someone to make medical and financial decisions in case of disability, minimizing estate taxes, and protecting assets for children and future generations. We also work closely with our clients' accountants, financial advisors and insurance representatives to design personalized, multifaceted estate plans that reflects their unique goals and values.

The attorneys in Paley Rothman's estate planning group are leaders in the field. Some of our attorneys have been recognized by *Best Lawyers in America*, *Super Lawyers*, the *Washingtonian* and the *Washington Business Journal*. Two attorneys in this group are also Fellows of the American College of Trust and Estate Counsel. While we take pride in these accolades, we feel that the greatest testament to our success is our representation of families across multiple generations. We prepare wills, financial powers of attorney, advance medical directives, and, where appropriate, revocable trusts, irrevocable life insurance trusts, other tax savings trusts, charitable trusts and foundations, family limited partnerships and limited liability companies, multi-generational trusts (often including sales to trusts) and premarital agreements. We ensure that the beneficiary designations for our clients' life insurance policies and retirement accounts are coordinated with their estate plans.

We assist clients in Maryland, the District of Columbia and Virginia. Our clients include successful business owners, corporate executives, professionals, and young couples wanting to create their first estate plan for their growing family. We work with couples in second marriages, non-citizens, same sex couples, and beneficiaries with special needs, all of whom have unique planning issues.

The attorneys in Paley Rothman's estate planning team are also members of the firm's estate administration group, which handles all of the estate and probate issues that arise after death. This allows us to design estate plans that streamline the probate and estate and trust administration processes.

The considerable size of Paley Rothman's estate planning team has allowed our attorneys to concentrate in specific areas of this field, including life insurance matters, international tax and estate planning, charitable giving, qualified retirement plans and multi-generational beneficiary designations for plan and IRA assets, estate planning for non-US citizens, estate planning for US citizens owning assets in other countries, real estate and business and succession planning. Although our clients primarily work with one attorney, they benefit from the specialized knowledge of our entire estate planning team.

Our experience in complementary areas of the law such as real estate, tax, retirement plans, deferred compensation, family law, corporations, and partnerships and limited liability companies further enables us to provide cutting-edge, comprehensive representation for our estate planning clients.

HIGH NET WORTH INDIVIDUALS & FAMILIES

While we serve all of our clients with the utmost level of technical excellence and responsiveness, we also understand the unique needs of high net worth individuals and families. In advising high net worth clients, Paley Rothman's estate planning group works closely with clients' financial advisors to optimize wealth management and preservation. We have significant experience in charitable giving techniques and the establishment of family foundations. Our attorneys frequently devise dynasty grantor trusts or unique financial trust vehicles designed to ensure the healthy and productive development of the family's forthcoming generations.

RESOURCE CENTER

Paley Rothman shares this library of resources with clients and friends of the firm to help them stay ahead of legal and business developments and trends. Here, you will find helpful tips and tools written by our attorneys on estate planning topics.