MusickPeeler



Trusts & Estates

Musick Peeler's Trusts & Estates Group has attained a national reputation for its expertise in estate and gift taxation, charitable and philanthropic planning, tax planning for highly compensated and high net worth individuals, estate and conservatorship administration, and probate litigation matters.

The Group's attorneys are recognized for the sophistication and innovation of their planning techniques tailored to meet each client's needs while keeping in the forefront the client's personal objectives, financial situations, and the impact of tax and business considerations.

Related Professionals

E. Garrett Barlow

Tim T. Chang

Robert J. Coleman

Richard S. Conn

Richard A. Galofaro

James M. Hassan

Corey C. Larez

Laura K. McAvoy

Estate Planning

The Trusts & Estates Group represents individuals, including entrepreneurs, executives, professionals, philanthropists, and entertainers, and their families in the preservation of personal wealth and business assets. The Group's estate planning services include:

- Tax and business succession planning
- Wills and Powers of Attorney
- Lifetime and testamentary trusts of all types
- Charitable trusts and foundations
- Family LLCs and limited partnerships
- Wealth management and succession planning
- Charitable giving including trust and insurance planning

Exempt Organizations

Musick Peeler's Trusts & Estates attorneys also represent exempt organizations, including hospitals, universities, museums, private and public foundations, trade associations and other entities generally exempt from federal and state taxation in matters involving:

- Formation of tax-exempt entities
- Maintenance of tax-exempt status
- Obtaining IRS determination letters
- Taxation of unrelated business taxable income
- Fundraising and compliance requirements under federal, state, and local rules and regulations

Controversies

Musick Peeler's attorneys also represent clients in various phases of interaction with government authorities, including property tax appeals, sale and business license tax matters, private letter ruling requests, IRS examinations and assessment procedures, and representation before the United States Tax Court and other federal courts, including the United States Supreme Court.

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