



Estate Planning & Administration

At Seltzer Caplan McMahon Vitek, we believe a good estate plan is enhanced by wisdom and achieved by working with those who have come to understand the possibilities and responsibilities that wealth and success can bring. We also respect the personal nature of the process and the critical role that family dynamics and interpersonal relationships play in determining whether various estate planning techniques are appropriate for our clients.

SCMV's estate planning and administration attorneys work with individuals and families of all walks of life and have particular expertise working with high-net-worth individuals and families, including those with closely-held businesses. We are expert in all aspects of estate tax, gift tax, income tax, property tax, and retirement benefit planning, and we specialize in creating plans to protect the interests of family members and heirs, to manage our clients' assets to benefit charities, to address gift and estate tax issues, and to translate the aspirations of our clients into a legally sound and sustainable plan.

All forms of revocable and irrevocable trusts, including:

- Tax and non-tax based revocable trusts and wills
- Generation skipping trusts
- Life insurance trusts
- Qualified domestic trusts (QDOTs)
- Charitable remainder and lead trusts
- Minor education and gift trusts
- Qualified personal residence trusts (QPRTs)
- Special needs trusts
- Inter vivos and testamentary private charitable foundations
- Irrevocable grantor and non-grantor trusts (IDGTs)
- Grantor retained annuity trusts (GRATs)

Services

- Estate, tax and multi-generation succession planning
- Charitable giving and family gift planning, including private foundation formation and administration
- Retirement and deferred compensation planning
- Health care and disability planning
- Trust and estate litigation, elder abuse claims and mediation of contested matters
- Fiduciary accounting and taxation (including audits)
- Trust and estate administration
- Probate matters
- Estate/gift taxation, including: return preparation and audits