STROOCK

Related Services

- Corporate
- Litigation
- Real Estate
- Tax

Areas of Focus

- Estate and Trust Administration
- Estate Planning
- Not for Profit Organizations and Charitable Giving

Private Client Services

Our Private Client Services Group has built a national reputation on a foundation of technical expertise, trust, sensitivity and loyalty. We work closely with clients to help them identify goals and objectives and to provide innovative and pragmatic solutions tailored to their needs. We address a broad range of issues, including: estate planning and related tax work; estate and trust administration; estate and trust litigation; planning for family businesses; and charitable giving.

Our keen understanding of sweeping changes to estate, gift and generation-skipping tax regimes enables us to build flexible, creative will and trust documents, assuring that our clients' plans will work under new scenarios. It is not unusual for Stroock to simultaneously represent several generations of the same family. Nor is it uncommon for our lawyers to serve, at the request of clients, as executors of wills, as trustees of family trusts and as directors of family foundations.

As a recognized leader in the field of trusts and estates, we have written books and articles on estate planning and trust and estate administration and have lectured extensively.

Our Scope of Services

With the resources of Stroock's other practice groups to draw upon, such as Real Estate, Corporate, Tax, ERISA and Litigation, Stroock's Private Client Services lawyers are well-positioned to provide clients with creative solutions to the frequently complex matters that arise in this area. Clients benefit from the attentive service provided by our other lawyers, who may also be aware of and provide counsel regarding their business affairs. We combine our expertise with the full scope of Stroock's services to help our clients:

- Devise and implement plans to dispose of their assets in accordance with their wishes in a tax-efficient manner;
- Develop succession plans for family-owned businesses;
- Create family entities, including corporations, family partnerships, limited liability companies, trusts and foundations, to achieve their objectives concerning the disposition of property and the management, control and preservation of assets, taxes and charity;
- Administer trusts, estates, family offices and not-for-profit organizations, with particular attention to financial matters, fiduciary duties, family issues and tax considerations;
- Minimize taxes, including income and transfer taxes, both during lifetime and at death, for domestic and international clients;

- Address matrimonial issues; and
- Resolve and, if appropriate, litigate disputes involving trust and estate matters

Lawyer Savvy

With extensive experience handling complex private estates and foundations, Stroock’s Private Client Services lawyers are highly knowledgeable in the technical and legal issues of estate planning and its attendant issues, including tax planning, non-profit and corporate law. Stroock lawyers have extensive litigation experience in the Surrogate’s Court, particularly in contested estates, accountings and other adversarial proceedings. The frequent participation of technical experts from Stroock’s other practice areas lends an in-depth understanding of the business and economic issues that may arise in connection with clients’ personal plans.

As a recognized leader in the field of trusts and estates, we have written books and articles on estate planning and trust and estate administration and have lectured extensively. Two of our lawyers co-author Manning on Estate Planning, a comprehensive book popular among practitioners and law students throughout the country. We participate actively in bar associations and other professional organizations and community groups. These activities help build our commitment to our clients, the profession and our community.