Private Client, Trusts and Estates

Our Private Client, Trusts and Estates Group is dedicated to the personal and sophisticated legal needs of high net worth individuals and families. Effective tax planning is just one step in addressing the management and transmission of family wealth. But successful planning also requires intelligent design based on sound experience and a focus on execution. Our attorneys have unparalleled experience in this area and play the critical role of listener, often confidante, and always advisor, in addressing the unique family issues that relate to a successful estate plan. They are legal counsel, but also personal counsel, with the experience to access the cross-disciplinary resources of a full-service law firm or to recognize, where needed, specialized outside resources for high net worth families.

Planning

For high net worth individuals with myriad holdings, effective transfer and tax planning requires more than mastery of the ever-changing legal, tax, and regulatory rules — it requires true finesse. Our team of seasoned attorneys have successfully developed and implemented sophisticated estate plans for some of the country's most affluent individuals and families. Drawing on our deep experience, combined with intellectual rigor on the cutting edge of wealth transfer techniques, we deliver forward-looking planning focused on each client's unique circumstances, goals, and needs. We work hard to ensure that what you build today will benefit generations to come.

Estate & Trust Administration

We represent executors, trustees, and beneficiaries in the full range of estate and trust administration matters, from the settlement of estates, to tax return preparation and audits, to ongoing trust accounting and implementation. We have unsurpassed experience in the administration of estates and trusts and have a dedicated team of paralegals, trust administrators, and other bookkeeping and support staff. In all matters, we take a practical and personalized approach made possible by our commitment to individualized client service.

Family Office

Cozen O'Connor's **Family Office Practice** works with high net worth individuals and families to, first, assess whether an independent family office is the recommended approach and, second, to develop family office structures and operations that efficiently meet client needs and priorities.

The Family Office Practice draws on the knowledge and experience of lawyers throughout the firm to create tax-efficient structures for our family office clients and advise on regulatory compliance, tax planning, estate and trust planning, structuring of pooled investment vehicles, asset protection, risk management, privacy and data security, and charitable organizations and structures. Working in concert with this multidisciplinary team of attorneys, we provide comprehensive counsel to our family office clients. Most importantly, we immerse ourselves in and act in concert with each family's priorities, challenges, and aspirations.

A unique extension of our practice, **HomeBase, the Family Office @ Cozen O'Connor**, provides clients with an independent, non-investment advisory, multifamily office platform. Supported by state-of-the-art technology and a dedicated staff, HomeBase provides family office services such as data aggregation, financial reporting, bill pay, payroll, alternative investment tracking and reporting, foundation and trust administration, data privacy and cybersecurity, and other back-office operations.

Estate and Trust Litigation

When it comes to successfully resolving trust and estate controversies, experience, creativity, and

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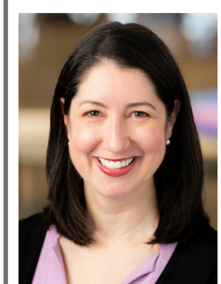

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Related Practice Areas

- Business
- Corporate
- Emerging Business & Venture Capital
- Family Law
- Family Office
- Fiduciary Litigation
- Real Estate
- Tax

Industry Sectors

- Sports

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tenacity are key. Our team offers each of these attributes in spades. We have been representing fiduciaries and other parties in will and trust contests, will and trust construction and reformation disputes, and other fiduciary litigation for decades. Whether sitting on the plaintiff's or defendant's side of the table, we identify the critical issues at hand and on the horizon, and cut a path to a timely and favorable resolution.

Philanthropy

Philanthropy is a significant priority for many of our high net worth clients, and we recognize that effectively implementing a philanthropic plan requires a multidimensional approach. We represent individuals, families, and family offices in connection with their most significant philanthropic and charitable giving campaigns. Our services in this area include the creation of foundations, planned giving, issues involving public charity board service, and advice regarding tax compliance and governance.

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