SHULMAN ROGERS

Wills, Trusts, Estates and Probate

Wills, Trusts, Estate and Probate Lawyers Serving Maryland, Virginia and Washington DC

Proper planning is essential to maximizing the value of your wealth, not only for you and your immediate family but also for future generations and charitable institutions.

The Wills, Trusts, Estates & Probate Law attorneys of Shulman Rogers are knowledgeable in all areas of estate planning and estate administration, including trust administration and fiduciary litigation. We have extensive experience with the often-complicated tax and probate laws governing the transfer of assets, which allows us to assist our clients in achieving their estate planning goals by designing and implementing individualized strategies that allow for the transfer of wealth to future generations, the donation of philanthropic gifts and the disposition of assets at death. We are always mindful that the estate planning process requires our clients to make some of life's most important and sensitive decisions.

We represent a wide array of individuals, families, entrepreneurs and executives throughout Maryland, Virginia and the District of Columbia regarding the preservation, management and transfer of wealth. We consistently devise flexible and unique estate plans capable of responding to changing family situations, shifting investment climates, varying legislation and other unforeseen circumstances. Experienced, compassionate and creative, we are adept at using our knowledge to devise individualized solutions to our clients' estate planning challenges.

Estate Planning

Effective estate planning requires not only drafting the essential documents, such as a will, revocable trust, financial power of attorney, health care power of attorney and living will, but also designing a comprehensive plan that provides for the transfer of assets and the minimization of taxes and related costs. In designing our clients' estate plans, we utilize sophisticated planning strategies, including the use of charitable lead trusts, charitable remainder trusts, dynasty trusts, grantor retained annuity trusts, insurance trusts and qualified personal residence trusts, as well as other planning and tax reduction tools, such as the formation of family limited partnerships and limited liability companies.

We work with our clients to design a customized estate plan and are always available to manage the ongoing implementation of that plan to ensure that it continues to support our clients' goals and needs. We are pleased to work with our clients' other advisors, such as financial planners, investment advisors, accountants and insurance agents to ensure that our clients' estate plans succeed within their existing financial frameworks.

Estate Administration

We understand that the loss of a loved one is challenging and we strive to ease the burdens of the estate administration process. We offer a comprehensive range of services including coordination of probate court filings and proceedings, distribution of assets and filing of estate and gift tax returns at the state and federal level. Additionally, we are dedicated to resolving many of the family and personal issues raised during the estate administration process with sensitivity and professionalism.

Trust Administration

In addition to providing quality planning techniques to our clients, we are also available to serve as professional trustees and executors. As with all other services, we provide individualized attention to our clients' needs.

Charitable Organizations and Philanthropy

If charitable giving is part of a client's estate plan, we provide guidance with regard to the implications of philanthropic gift giving, as well as the establishment of charitable organizations, including public charities, private foundations and charitable trusts. Additionally, we counsel public and private charities with respect to formation and fiduciary responsibility, as well as tax, regulatory and corporate compliance.