Private Wealth Management Cambridge

Private Wealth Management Cambridge - We can help our clients through our Wealth Management practice in the areas of wealth preservation, estate planning, business succession, and charitable endeavors. In these areas, we offer comprehensive knowledge, expertise and guidance to the several entrepreneurs, philanthropists, executives, and high net worth people. We work closely along with our clients' financial advisors and accountants to deliver quality results and service.

Charities and Philanthropy
Planned giving is integral to personal wealth planning. Clients have to know the laws of philanthropy with the numerous legal and tax implications. When clients like to establish techniques of planned giving like for example charitable foundations, we advise them regarding structuring, compliance and administrative problems.

Family Estate & Trust Litigation
We are experienced in acting as counsel through mediations, litigations and arbitrations before all levels of the courts and several administrative tribunals.

Family Business Transition and Succession Planning
Our wealth management services consist of providing suggestion to family-owned and other closely held companies. We help such enterprises so as to reach family goals regarding the restructuring and structuring of their businesses in the most tax-efficient way. Our knowledge covers inter-generational transitions along with transitions to outsiders in different endeavors and industries. These transitions are facilitated through arrangements like corporate reorganizations, shareholder's agreements, the settlement of trusts, and management agreements. Comprehensive solutions frequently need other experts in, for instance, matrimonial or real estate law. Our firm has these experts as well as professionals in business law and tax.

Individual Estate Planning and Wills
We know that clients who have accumulated significant wealth face complicated tax and legal concerns in addition to sensitive inter-personal dilemmas. Our experts know how to maximize tax-efficiency, minimize legal risk, and reduce family distress while implementing and designing plans which are flexible, comprehensive, and consistent with our clients' values and goals. The sale or purchase of a new company, a divorce, an inheritance - these are all major financial events within anyone's life. We offer useful and personalized guidance in such situations.

Trusts
In order to help clients in their personal and business affairs, we would regularly advise concerning private trusts as a flexible tool. For the beneficiaries and trustees of private trusts, we also provide ongoing advice. We are experienced at creating family trusts to be able to facilitate the inter-generational transfer of wealth. There are several other kinds of trusts wherein our practitioners regularly help clients, like for instance trusts for disabled beneficiaries, voting trusts, spendthrift trusts, blind t rusts, asset protection trusts, and immigration trusts. For clients interested in philanthropy, we can establish charitable trusts.

Private trusts are a helpful tool in the tax planning context: we advise clients regarding tax planning opportunities such as probate fee and property transfer tax avoidance, income-splitting, inter-provincial rate shopping, and accessing multiple capital gains exemptions.

Our lawyers are knowledgeable in trust litigation in situations whereby the trust is being used offensively as a weapon and defensively. We offer counsel and offer our recommendation for dispute resolution and matrimonial planning cases.

Wealth Preservation
Our practice also helps those clients who are under attack from creditors or challenge from future heirs. The goal of our company is to preserve the wealth of our clients by using techniques like for instance establishment of trusts or prenuptial agreements.