

## Wealth Management Firms Cambridge

Wealth Management Firms Cambridge - Our Wealth Preservation & Estate Litigation Practice helps clients with whichever issues significantly affecting the interests of an estate, including the preservation and creation of wealth through estate planning, administration and litigation. Addressing your concerns, and whichever other problems which may impact the estate without your knowledge, is our primary responsibility.

Our litigation and planning lawyers are knowledgeable at various levels to make sure that matters are addressed quickly and cost-efficiently. They work closely together to deal with all matters that can arise to challenge your plan. Our planning advice and litigation services are based on thorough knowledge of the planning process to be able to provide a net benefit for our clients.

Our firm represents a lot of leading charities, offering our services in the incorporation of societies, the establishment of charitable foundations and trusts, and providing recommendation in the administration of non-profits and charities.

For organizations, groups and companies we offer estate planning seminars and for family businesses we provide business succession planning. Group discounts to workers or members of the same institution or corporation are existing.

### Estate Planning

We can create and prepare comprehensive techniques to help decrease taxes and various financial issues placed upon the estates. This is really required to protect the beneficiaries from avoidable expenses and frustration. We likewise can offer help with plans for charitable purposes.

#### o Trusts

We advise individuals, institutions, and businesses on administrating, distributing and creating trusts to be able to enhance wealth preservation and creation. By working closely with accountants as well as various business advisors to structure and implement trusts, we help you attain your future and present requirements. Trusts are flexible, powerful tools which include discretionary family trusts, corporate reorganizations, estate freezes, "joint spousal" and "alter ego" trusts, non-resident trusts, asset-protection, and planning for succession needs and retirement.

#### o Wills Drafting

Before preparing a will, we thoroughly determine your needs and explore your choices in detail. Our level of attention ensures certainty and security for your estate and guarantees that your desires are fulfilled.

#### o Estate Planning for Business Owners

For businesses, we offer suggestion ranging on topics from shareholders agreements, corporate reorganizations, estate freezes and succession planning.

#### o Adult Guardianship - Incapacity Planning

For adult guardianship issues, our personal approach is essential for dependent adults and their families. The requirements of these clients need a sensitive touch. Our work includes representing clients making applications for adult guardianship, and offering recommendation related to the responsibilities of trustees and guardians. We assist with the use and preparation of Representation Agreements and health care directives.

### Probate and Administration of Estates

Clients require sound, timely suggestion to provide for immediate needs of family members, conserve estate assets, and deal efficiently with all aspects of an estate. We approach the role of Administrator or Executor with the commitment demanded of this responsibility.

The correct administration of an estate comprises several steps with which we can provide assistance. We help with locating wills; safeguarding, locating and collecting assets; preparation of papers needed to get Court approval of your appointment as Personal Representative; income taxes and various estate liabilities; passing and preparation of the Personal Representative's Accounts; asset distributions, like land transfers; and administrating ongoing trusts for children or lifetime beneficiaries.

Numerous trust institutions, individuals and companies require advice in the administration of estates. We work alongside other professionals in accounting, trusts, banking, insurance and investments to help provide you with a comprehensive and well-coordinated service.

### Estate Litigation

We handle estate litigation like for example challenges which arise from contested wills, the Wills Variation Act, constructive trust claims and trust variations. Our Estate Litigators represent clients in every level of court, and in alternative dispute resolutions like for example mediations.

#### o Contested Wills and Trusts

Our knowledgeable litigators act in disputes arising from poor drafting, undue influence, incapacity and improper will execution.

#### o Wills Variation

Our litigators represent claimants, beneficiaries, and estates in wills variation claims initiated by disappointed spouses or children.

#### o Constructive Trust Claims

Our teams of lawyers could prosecute and defend in estate litigation matters comprising unjust enrichment claims and constructive trust.

#### o Trustee Disputes

We represent disappointed beneficiaries, trustees and pension managers, in cases of dispute arising from the administration or investment by trustees, trustee compensation, and the passing of trustee accounts.

#### Mediation

We resolve disputes associated to estates, estate planning, incapacity, or elder care, by offering legal counsel at mediations, and in some cases could act as a mediator, either by the parties directly or by counsel to the parties, before or after litigation is commenced.