

PRACTICE GROUP
LEADER

Carlena L. Tapella

916.558.6056

ATTORNEYS

Kay U. Brooks

Shareholder

Janet Z. Chediak

Of Counsel

Hilary L. Lamar

Shareholder

ESTATE PLANNING

Weintraub estate planners advise individuals and families in developing a plan to carry out their wishes in the conservation, management, and transfer of their assets and businesses. Our attorneys strategically work to gain the maximum benefits from pertinent laws and minimize the estate tax, gift tax, property tax and generation-skipping transfer (“GST”) tax burdens associated with the transfer of wealth between generations.

Our estate planners have extensive experience with designing and implementing sophisticated estate, valuation, and philanthropic planning techniques, including such planning vehicles as family limited partnerships and limited liability companies, grantor trusts, life insurance trusts, charitable lead and charitable remainder trusts, and other charitable planning devices. Weintraub attorneys work with clients to integrate their business succession planning and retirement planning.

As a result of recent tax law changes, our planning strategies include full consideration of income tax basis and value appreciation in our clients’ various assets, and the potential for portability of our clients’ unused estate and gift tax exemptions.

Most Americans care very deeply about their legacies, both how family and friends will remember them and how heirs will benefit from the lives that they have led. Yet the same studies show that less than half of Americans have created a will, and an even smaller percentage has put in place other important plan essentials such as a healthcare directive or durable power of attorney. Every day Weintraub estate planning attorneys work with clients to ensure that their wishes are carried out and that their families and heirs benefit not only from an inheritance but also from careful transition planning.

