



REID AND RIEGE, P.C.
COUNSELLORS AT LAW

Estate Planning & Estate Settlement

Estate planning has been a cornerstone of Reid and Riege's practice from the firm's inception. The Individual Client Services Practice Area offers clients a wide range of services in estate planning through all stages of their lives. We represent clients who have significant assets and require careful planning to control the disposition of those assets and reduce taxes.

Estate planning services include extensive consultation, preparation of customized wills and trusts and development of gift strategies. These services have two aims:

- To develop estate plans that achieve the client's goals for distributing assets, including prenuptial planning, charitable planning, business succession planning, asset protection planning and planning for family members with special needs; and
- To minimize tax obligations through gifting, estate planning and post-mortem strategies.

Occasionally attorneys from the Individual Client Services Practice Area are asked to serve as an executor or trustee for a client. If it is in the best interest of the client, the attorney accepts the responsibility in conjunction with management from our Fiduciary Services Group.

The settlement of estates requires knowledge and experience with the complex matters of inheritances, interpretation of wills and trusts and trust reformations. We provide comprehensive services, including:

- Assisting executors and trustees with estate administration by guiding them through the probate court system;
- Appearing in probate court on behalf of estates, heirs or beneficiaries;
- Preparing federal and state estate tax returns and fiduciary income tax returns; and
- Representing estates selected for audit by the Internal Revenue Service or local tax authorities.

During this often difficult time for families, we manage the settlement of estates for our clients with efficient, sensitive, responsive and result-oriented representation.



Attorneys

- Greg R. Barringer
- Suzanne S. Bocchini
- John Paul Callahan
- John R. Ivimey
- Frederick J. Mullen Jr.
- Barbara A. Taylor