Individual Client Services

The attorneys in Zukerman Gore's Individual Client Services practice offer sophisticated planning and legal and business guidance to family-run enterprises and individuals. We help individual clients navigate complex gift estate planning laws. We guide privately held family-owned companies through business deals and day-to-day operations and legal matters. We work with clients to set clear and achievable financial and strategic goals, develop the plans for realizing their objectives, and execute tax-efficient transfers of wealth to future generations.

And we draw on the knowledge and experience of other firm practice groups to minimize tax liabilities, ensure smooth successions, and assist clients in growing their wealth and assets for the future.

Personal Estate Planning

Our lawyers draft wills and lifetime trusts, design estate plans and living wills, establish charitable foundations and related vehicles, and administer estates. We make innovative use of vehicles such as insurance trusts, grantor trusts, and inter-family sales and transfers to ensure the tax-efficient transfer of wealth. In addition, we advise executors and surviving family members on post-mortem estate planning opportunities.

Clients appreciate our comprehensive knowledge of the federal and state statutes and rely on us to ensure that their beneficiaries are provided for in the most tax-efficient manner possible.

Family-owned Businesses

We have a long history of guiding clients with partial or full ownership in businesses, helping to negotiate buy/sell agreements, develop arrangements for the inter-family transfer of corporate, partnership, or limited liability company interests, and ensure that business decisions align with long-term planning and ownership goals.

Our attorneys excel at quickly and efficiently resolving disagreements that often threaten the businesses of our clients, communicating the rights and obligations of stakeholders, developing plans of action to enable them to work through differences, and most importantly managing family dynamics to protect client wealth and assure harmonious relationships among majority and minority owners as well as key non-family employees.

Results

Attorneys

- Matthew Sabloff
- Nathaniel S. Gore