



ESTATE AND TAX PLANNING

Family offices and closely held businesses often serve as vehicles for our clients' current and long-term personal, family, financial and tax objectives. Our family offices and closely held businesses practice is a natural complement to our estate planning practice. We help affluent families develop and implement comprehensive and sophisticated estate, gift and tax planning strategies. Our services include strategies to preserve and transition family wealth; fiduciary services with respect to trusts, estates and investment vehicles; trust administration and fiduciary accounting; and estate settlement and tax preparation.

Cummings & Lockwood - *The Choice* for sophisticated legal counsel.