Lowenstein Sandler

Trusts & Estates

Trust and estate planning and administration is a delicate process that encompasses the fruits of a life's work, fundamental values, and dreams for posterity. The possibilities are as wide-ranging as the people they may affect: A business owner spends a lifetime building a thriving enterprise and wants to ensure its continued success when his children take the reins. A major philanthropist wonders whether she is maximizing the tax benefits of her charitable giving. A wealthy family hopes to enrich the next generation while instilling important values. Parents worry about financial security for their special-needs child. An engaged couple, both previously divorced, want to protect each other financially while ensuring that the children from their prior marriages ultimately receive their assets.

Each of these situations, and many others like them, demand a rare combination of experience and empathy. That we have it shows in the relationships we've built with clients and the accolades we've received from industry watchers and our peers alike. *Chambers USA* ranks us in the top band for private wealth law in New Jersey (2020), and we are regularly ranked among the nation's Best Law Firms by *U.S. News – Best Lawyers®*. Our Trusts and Estates group also includes four fellows of the American College of Trust and Estate Counsel, a national organization of lawyers who "demonstrate the highest level of integrity, commitment to the profession, competence and experience as trusts and estates counselors."

Our lawyers tailor estate plans to each client's circumstances, goals, and dynamics, addressing complex, evolving federal and state laws with the goal of minimizing taxes. We represent family businesses and other privately owned firms, helping them create tax-smart strategies that achieve the owners' goals, from preserving the business for future generations to selling the company. We work with executors and trustees in estate administration and handle the fiduciary litigation that sometimes arises from disputes around them.

Our practice also extends beyond trusts and estates to marital planning, charitable planning, and litigation, all with a focus on each client's unique situation. We assist tax-exempt organizations, including family foundations, in understanding and complying with complex tax rules and other regulations while helping donors achieve their philanthropic goals. We prepare prenuptial agreements with a sensitivity to couples' desires and the need to eliminate acrimony while achieving maximum tax savings, and we design estate plans that complement the agreement. Our trusts and estates clients can tap the full resources of Lowenstein Sandler for help with a broad array of legal and business matters.

But perhaps the most important thing we provide is the good judgment and sound advice that comes from decades of helping individuals and families articulate their wishes and achieve their goals. Indeed, we believe we can genuinely meet our clients' needs only when we genuinely understand our clients.

HONORS & AWARDS

- **Chambers High Net Worth Guide (2016-2020)**
  #1 ranking for Trusts & Estates practice: Private Wealth Law
- **U.S. News & World Report Best Law Firms: Recognized in Trusts & Estates Law (2017-2020)**
- **Private Asset Management (PAM) Magazine: Received Best Law Firm – Client Service award for three consecutive years (2013-2015)**
- **Volunteer Lawyers for Justice (2020)**
  Eric Weinstock – Recognized as September Volunteer of the Month for his contributions to the life planning project