Trusts & Estates

APPROACH

Ruberto, Israel & Weiner's Trusts and Estates Group helps clients create a wealth transfer plan that will ultimately preserve and transfer their business and personal wealth to future generations in a harmonious, tax-efficient manner. Our attorneys are known for formulating creative, practical solutions to complex estate and business succession planning issues that achieve our clients' personal, and estate and tax minimization planning objectives. We have strong relationships with our clients, and develop a highly customized solution for each client's unique situation. We also work collaboratively with our clients' other advisors to obtain efficient and cost-effective planning results in a holistic fashion.

TEAM

Our Trusts and Estates attorneys are highly sophisticated and knowledgeable in all aspects of estate planning and administration, yet are able to successfully guide clients and their families through the estate planning process in plain English using flowcharts and other helpful materials. Most of our attorneys have Masters of Law Degrees in taxation and are sought after to speak on estate planning topics for attorney continuing education seminars, charitable organizations, and others.

The tax and business law backgrounds of our team members informs our work with closely held business owners, executives, and entrepreneurs. We understand the complex business and tax implications inherent in building an estate plan for these individuals, and we work with our corporate, business, and real estate lawyers to structure comprehensive business succession plans and/or buy-sell arrangements that will ensure a smooth business transition for all relevant assets.

Our overall goal is to minimize our client's overall estate and income tax burdens in a manner that preserves to the extent possible, family harmony.

CONTACT

When was the last time you reviewed your estate plan? Let us show you how to better achieve your family's inheritance and tax planning goals. For more information, contact **Rachel M. Wassel**, Trusts and Estates Group Chair, at (617) 570-3524 or **rmw@riw.com**.

CONTACT

Rachel M. Wassel

(617) 570-3524

Send Email

PROFESSIONALS

Megan L. Dean

Rachel M. Wassel

Celine Ramsingh

SERVICES

ESTATE & GIFT PLANNING

We have extensive experience in designing, drafting, and implementing the following:

- Wills
- Revocable Trusts
- Durable Powers of Attorney
- Health Care Proxies
- HIPAA Releases
- Life Insurance Trusts
- Generation Skipping Trusts
- Grantor Retained Annuity Trusts (GRATs)
- Qualified Personal Residence Trusts (QPRTs)
- Charitable Trusts
- Private Foundations
- Trusts for Minor Children
- Grantor Trusts
- Intra-Family Sales

PLANNING FOR SPECIAL SITUATIONS

- Non-Resident Aliens Subject to U.S. Estate Taxes
- Non-Citizen Spouses
- Retirement Plan Benefit
- Estate Planning Aspects of Divorce
- Ante-Nuptial Agreements
- Concentrated/Family Real Estate Holiday and Vacation Homes

ESTATE & TRUST ADMINISTRATION

Working together with outside investment managers, we serve as fiduciary for estates and trusts, and we counsel individual and institutional fiduciaries serving as personal trustee representative with respect to the following:

- Probate
- Trust Funding
- Estate and Gift Tax Return Preparation
- Trust Administration
- Tax Planning
- Distribution Strategies

ELDER LAW & LONG-TERM CARE PLANNING

- Irrevocable Trust Planning
- Application for Long-Term Care Benefits (Mass Health, etc.)
- Special Needs Planning