Estate Planning

Planning an estate goes beyond the creation of legal documents. It's about securing the client's legacy, providing peace of mind, and ensuring that their wishes are honored. We provide pragmatic and practical representation addressing the full gamut of estate planning services, from individually tailored wills and trusts, durable powers of attorney and advance directives to more complex strategies for families and individuals. Our experienced estate planners meticulously address all essential elements of a well-designed estate plan that addresses each client's unique circumstances, goals and concerns. The components of an estate plan often go well beyond the drafting of a legally sound will and may include the establishment of revocable or irrevocable trusts, the preparation of financial and healthcare powers of attorney, the coordination of beneficiary designations, tax planning strategies, and the establishment of guardianship arrangements for families with minor children or individuals with special needs.

Practice Leader

Michael K. Feinberg

Partner

732.476.2710

mfeinberg@greenbaumlaw.com

Practice Team

Michael A. Backer

Partner

732.476.2450

mbacker@greenbaumlaw.com

Michael K. Feinberg

Partner

732.476.2710

mfeinberg@greenbaumlaw.com

Brian Selvin

Partner

732.476.2434

bselvin@greenbaumlaw.com

Thomas C. Senter

Partner

732.476.2650

tsenter@greenbaumlaw.com

Lauren M. Ahern

Counsel

732.476.2398

lahern@greenbaumlaw.com

Meghan E. Anderson

Associate

732.476.2720

manderson@greenbaumlaw.com

Experience

Representative Matters

- Advised the administrator of a multi-state $70 million estate, where the decedent died without a will, in resolving competing beneficiary interests and completing administration without dispute.
- Advised the executor of an estate with more than 30 domestic and international charitable and individual beneficiaries, coordinating cross-border distributions and guiding the matter to final settlement.
- Advised the administrator of a multi-million-dollar estate holding an interest in a closely held business, preparing New Jersey inheritance tax filings and securing state approval of a favorable valuation position.
- Successfully petitioned for and obtained a federal and state income tax refund exceeding $500,000 on behalf of a decedent's estate.
- Represented beneficiaries in a long-pending estate administration, securing long-delayed distributions and recovering additional funds by challenging improper expense allocations.
- Designed and implemented advanced estate planning strategies for a high-net-worth client, removing more than $40 million in assets from the taxable estate.

- Structured a comprehensive estate plan for a family with a special needs child, creating long-term protections while preserving flexibility for other beneficiaries.
- Advised a blended family on estate planning involving jointly owned real estate and retirement assets, balancing spousal support with protection of children's inheritance rights.
- Developed an estate plan for a closely held business owner with children in differing roles, equitably allocating interests while preserving business continuity
- Structured asset ownership and financial arrangements for a married couple to preserve assets while qualifying a cognitively impaired spouse for Medicaid benefits.
- Advised a family on long-term care planning for an elderly parent, implementing strategies to protect substantial assets while ensuring access to assisted living and medical care.
- Implemented a tax-efficient succession plan for family-owned operating and real estate businesses, enabling the orderly transfer of ownership to the next generation.
- Successfully defended an executor against challenges to a complex administration involving the succession and continued operation of privately held businesses within a multi-million-dollar estate.

Insights & More

Client Alerts

Wealth Transfer Strategies to Consider in the Age of COVID-19
6.09.20