Wealth Preservation

Asset Protection | Charitable Planning | Elder Law Services | Estate Planning | Guardianship | Personal Tax | Privately-Owned Business Planning | Probate, Trust & Estate Administration | Special Needs Planning | Trust & Estates Litigation

ABOUT US

Porzio's Wealth Preservation Group is made up of attorneys with decades of experience in guiding individuals and families through wealth preservation. Our team works closely with you to protect your hard-earned assets and ensure they are passed on to the people and organizations that matter most to you. Your goal is our goal. We offer personalized strategies tailored to each client's unique financial goals, delivering peace of mind that your wealth is protected now and for generations to come. We understand that planning for end-of-life, disability, or aging can be complicated and emotional. Our experienced attorneys are here to help you navigate through this challenging time and make sure you feel secure and confident in your planning to ensure you reach your goals.

WHO WE SERVE

We provide a comprehensive range of services to preserve your wealth during your lifetime and beyond. We serve:

- Couples and individuals planning inheritances for their children
- Couples and individuals planning inheritances for loved ones
- Business Owners
- Parents
- Families
- Aging Adults
- Fiduciaries
- Executives
- Individuals with Special Needs
- Families of Individuals with Special Needs

OUR MISSION

Our mission is to listen to your needs, goals, and values, empowering you to make informed decisions about your family and finances in the face of life's uncertainties. We are committed to educating you on the law as it applies to your unique situation, and partnering with you to create a personalized plan that aligns your values with sound financial and legal strategies.

ATTORNEYS HELPING TO PLAN FOR YOUR FUTURE

WHY CHOOSE US?

Deep Industry Experience

Our team includes attorneys who have earned advanced degrees, including LL.Ms in Taxation and Elder Law, and the prestigious Certified Elder Law Attorney (CELA) designation.

People Focused

More than 60 years of client service. Porzio has established a strong track record of success, earning a reputation for excellence, integrity, and client satisfaction.

Maximizing Success

As leaders in our field, we not only practice but also educate others through speaking engagements and community service. We serve our community through board service to non-profits, estate planning and elder law attorney groups.

Legal Innovation

Porzio is committed to staying at the forefront of legal innovation, leveraging technology, data analytics, and creative problem-solving to deliver efficient and effective legal services.

Business Synergies

Porzio, PorzioCS, and Porzio Governmental Affairs (PorzioGov) form a cohesive family of companies offering legal, compliance, lobbying, and consulting services tailored to our clients' needs in a wide range of industries and practice areas, so that clients receive comprehensive assistance tailored to their specific needs.

ASSET PROTECTION

We identify risks to your wealth and implement strategies to protect your assets from future challenges, such as lawsuits, divorce, and financial mismanagement by beneficiaries.

Key Services

- Asset protection trusts
- Estate planning and asset preservation
- Lifetime gifting strategies
- Business succession planning
- Creditor and lawsuit protection
- Tax planning and liability minimization
- Retitling of assets between spouses
- Protection for minor or special needs beneficiaries
- Long-term care cost protection
- Personal liability reduction strategies

CHARITABLE PLANNING

Porzio helps clients establish and manage public charities and private foundations, ensuring compliance with tax regulations so they can focus on their philanthropic goals.

Key Services

- Formation and IRS filings
- Compliance and annual filings
- Long-term support to ensure charitable goals are met

ELDER LAW SERVICES

Our attorneys help clients navigate the complexities of elder law by providing personalized strategies to protect their assets, plan for long-term care, and ensure their family's needs are met with compassion and care.

Key Services

- Long-term care planning
- Medicaid and Medicare guidance
- Asset protection strategies
- Guardianship and substituted decision-making
- Estate and trust plan updates and creation
- Life care planning
- Family dispute mediation
- Special needs planning
- Legal representation in guardianship litigation

ESTATE PLANNING

We provide personalized estate planning and administration services that protect your assets, minimize taxes, and ensure your loved ones are cared for.

Key Services

- Comprehensive estate plan development
- Asset distribution planning after death
- Tax minimization strategies (income, gift, estate, inheritance)
- Asset protection from creditors and divorce proceedings
- Incapacity planning and decision-making authority
- Creation of trusts and family asset protection plans
- Coordination with financial advisors for estate plans
- Probate and estate administration assistance

GUARDIANSHIP

We assist families in navigating the guardianship process by evaluating whether it's the right option for a loved one, guiding you through court proceedings, and ensuring the appointed guardian effectively manages personal, medical, and financial decisions on behalf of the incapacitated individual.

Key Services

- Evaluation of the need for guardianship
- Assistance with court petition for guardianship appointment
- Guidance on selecting an appropriate guardian
- Guardianship for personal and medical decision-making
- Guardianship for financial management and protection of assets
- Ongoing support for guardians in fulfilling legal responsibilities

PERSONAL TAX

At Porzio, we provide high-net-worth individuals and closely held business owners with expert tax strategies that minimize burdens and maximize benefits, ensuring exceptional client service and efficient tax planning.

Key Services:

- Yearly federal and state tax preparation, including gift tax returns
- Personal income tax strategy and planning
- Retirement planning
- Fiduciary tax and administration
- Foundation management and oversight

PRIVATELY-OWNED BUSINESS PLANNING

Our attorneys help privately-owned businesses maximize value, manage risks, and plan for smooth transitions with tailored legal strategies that integrate both business and personal wealth planning.

Key Services:

- Buy-sell agreements and business documentation
- Employment law compliance and intellectual property protection
- Real estate, financing, and tax strategies
- Exit planning and succession strategies
- Estate planning for business owners to protect assets and ensure business continuity

PROBATE AND TRUST & ESTATE ADMINISTRATION

We provide comprehensive trust and estate administration services, helping fiduciaries manage estates efficiently and professionally, while alleviating burdens on family members.

Key Services:

- Probate estate administration
- Preparation and filing of estate, inheritance, and income tax returns
- Asset management and beneficiary distributions
- Trust administration in alignment with trust instruments and beneficiary needs
- Seamless coordination with trustees and advisory teams for optimal financial and tax outcomes

SPECIAL NEEDS PLANNING

At Porzio, we focus on Special Needs Planning to help families care for beneficiaries with disabilities, ensuring they retain access to vital government benefits while receiving the financial support they need.

Key Services:

- Planning for adults and children with disabilities to maintain access to SSI, Medicaid, and other benefits
- Creating special needs trusts to manage financial resources without disqualifying beneficiaries from government programs
- Assisting with guardianship, conservatorship, and capacity planning to protect individuals unable to make independent decisions

TRUSTS AND ESTATES LITIGATION

At Porzio, we represent clients in complex estate litigation, leveraging our deep knowledge and experience to resolve disputes related to wills, trusts, and fiduciary matters.

Key Services:

- Will challenges based on undue influence, lack of capacity, or defective execution
- Defense or challenge of estate and trust management through accounting proceedings
- Contested guardianship proceedings to determine or dispute guardianship needs
- Fiduciary removal proceedings due to incompetence or misconduct