

Estate Planning, Trust and Estate Administration and Probate Litigation

To aid clients in preserving wealth and minimizing tax exposure in matters of gifts, estates and trusts, the Estate Planning Group of Sideman & Bancroft represents individuals, spouses, domestic partners, and families in developing and implementing comprehensive estate plans. As a group, we bring a breadth of knowledge and experience that spans close to 100 years of law practice. Composed of partner-level attorneys at varying stages in their careers, the Estate Planning Group ensures your family a consistent, trusted advocate through generations.

Our attorneys offer clients options for both family wealth planning and tax planning that are tailored to their particular circumstances. We use the most current estate planning techniques to create clear and coherent estate plans, make tax-efficient gifts to family members, protect assets from creditors, pay estate taxes, and further clients' charitable intentions. Providing thoughtful and comprehensive solutions to the complex issues associated with significant wealth is our forte.

AREAS OF CONCENTRATION

Wealth Transfer Planning

The fundamentals of a sound estate plan—and often the first documents we draw up for our clients—include a pour-over will, revocable trust, durable power of attorney, and advanced healthcare directive. In addition to executing these essential papers, our attorneys assist clients with comprehensive estate, gift, and generation-skipping transfer (GST) tax planning.

The Estate Planning Group uses the most current techniques available, including dynasty trusts, grantor retained annuity trusts (GRATs), qualified personal residence trusts (QPRTs), and sales to intentionally defective grantor trusts (IDGTs) to transfer wealth in tax-efficient ways and to minimize burdens on heirs. The creation of family limited partnerships (FLPs) and limited liability companies (LLCs) are additional strategies for transferring wealth at reduced cost while facilitating business succession planning for the tax-efficient transfer of a family business.

Trust and Estate Administration and Probate Litigation

Sideman & Bancroft provides comprehensive services for trust and estate administration when an individual dies. These include implementing the terms of the trust as specified in the estate plan, filing the estate tax return, and gathering and distributing estate and trust assets. We handle income taxation of estates, trusts, and beneficiaries, and represent clients contesting or defending wills and trusts. Our attorneys assist in the appointment of conservatorships and guardianships for individuals and property, and provide representation to clients in probate court.



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Charitable Planning

The Estate Planning Group assists clients with all aspects of charitable planning, tailoring our advice to meet specific goals. We counsel on gifts to donor-advised funds and the creation of tax-exempt organizations, including private foundations, supporting organizations, private operating foundations, and public charities. We assist in creating these charitable entities and obtaining and maintaining tax-exempt status. Given the complex rules and requirements surrounding tax-exempt entities, we structure our practice to prevent clients from unwittingly straying into problem areas. We use charitable-giving techniques, including charitable remainder trusts (CRTs) and charitable lead trusts (CLTs), to help clients fulfill their philanthropic objectives.

International Planning

Because financial interests often cross national boundaries, the Estate Planning Group coordinates gift and estate planning for families with international investments, including U.S. residents with foreign investments, foreign families with U.S. interests, and multinational families. We also assist foreign individuals and corporations with income tax planning for their U.S. investments and contacts—including pre-residency planning for foreign individuals—and coordinate with local counsel in other jurisdictions to create the most tax-efficient structure for cross-border investments and transactions. Additionally, we administer estates of non-U.S. residents who are subject to U.S. estate tax.