

PRIVATE WEALTH PLANNING

Hodgson Russ provides comprehensive, personal, and strategic legal representation on wealth management matters for high-net-worth individuals and families, privately owned companies, individual and corporate fiduciaries, and foundations.

Our attorneys have extensive experience and specific knowledge regarding sophisticated tax and wealth preservation strategies. Our plan designs are highly personal, unique to the individual circumstance, and structured to minimize tax liability and exposure while remaining sensitive to each family's individual dynamic.

We counsel clients on the full spectrum of wealth planning issues, including fiduciary obligations, trust and estate administration,

philanthropic planning, dynamic planning, foundation management, and business management. Hodgson Russ has assisted families through multiple generations with wealth preservation, transfer and management, business succession and retirement plans, and marital property planning.

We frequently collaborate with clients' existing advisors, including accountants, other attorneys, and investment counselors, to achieve clients' objectives and goals.

Our plan designs are unique to the individual circumstances and structured to minimize tax liability and exposure while remaining sensitive to each family's individual dynamic.

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Practice restricted to U.S. law