

# 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, fiduciaries and foundations.

With over 200 years of experience, our firm understands assets and wealth. We have been helping families and organizations with wealth management and wealth transfers for generations. This level of experience has allowed us to appreciate that each family and enterprise is different and requires its own custom solution.

## How We Help

Our wealth management lawyers help individuals, families and organizations with:

- **Family office services:** We act as the attorneys for all of your family's legal needs. Whatever issues may arise, ranging from the sale of a business to advising on compliance matters for household employees, members of the private wealth planning group work with members of the Hodgson Russ legal team to provide you with full service representation. With roughly 200 lawyers throughout the firm and practice groups, we have the strength to advise on your family's unique and varied legal needs.
- **Estate planning:** Our team has extensive experience and knowledge on sophisticated estate tax and wealth preservation strategies. We create plans to minimize estate tax and maximize wealth preservation for the next generation. Remaining at the forefront of new legal developments and techniques, we stay proactive by bringing new ideas and opportunities you.
- **Trust administration:** We can handle any complex trust matters, including tax issues, trust reformations and decantings, beneficiary concerns, risk management planning and other tasks. In this capacity, we work to protect your interests, whether you already have a trust or need to create and manage a trust to protect your assets. Our attorneys work with trusts across the country and around the world, giving the team a deep breadth of knowledge in addressing issues that arise with international or cross-border trusts. And with a Delaware licensed attorney on our team, we have the bench strength to advise you on the many opportunities and advantages of creating Delaware trusts, or moving existing trusts to Delaware.
- **Philanthropic planning:** Nonprofit organizations and individuals who want to conscientiously use their assets to make a significant charitable impact turn to Hodgson Russ LLP for assistance with corporate governance questions, tax

## Contacts

Katherine Cauley  
716.848.1522  
kcauley@hodgsonruss.com

Thomas Collura  
518.433.2443  
tcollura@hodgsonruss.com

## Professionals

### Attorneys

Nathan Berti  
Andrew Besch  
Jillian Brevorka  
Katherine Cauley  
Thomas Collura  
Paul Comeau  
Catherine Eberl  
Kevin Gluc  
Kenneth Hunt  
Britta McKenna

### Paralegals

Meredith McCarthy

## PRIVATE WEALTH PLANNING

concerns, grants and other aspects of philanthropic projects. Our team works to ensure your foundation is fully compliant and does the greatest good for the greatest number.

- **Business management:** Running a business can create questions around tax issues, structure, international business practices and more. We work with our team of Hodgson Russ tax and corporate attorneys to create customized solutions and plans for your company so that you can focus on growth and profitability.

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. Our offices are conveniently located in Albany, Saratoga Springs, Buffalo, New York City, NY, Palm Beach, FL, and Toronto, ON. We're proud to serve clients in these jurisdictions, as well as across the world.

### In the News

Hodgson Russ Opens Palm Beach Office  
December 4, 2006

### Publications

U.S. Election Update: Are Changes to the Estate and Gift Tax Coming?  
*Hodgson Russ Trusts & Estates Alert*, November 11, 2020

New Legislation Proposes Sweeping Estate Tax Changes  
*Trusts & Estates Alert*, November 6, 2017

Proposed Regulations May Substantially Reduce the Availability of Valuation Discounts for Interfamily Transfers of Business Interests  
*Estate Planning Alert*, August 18, 2016

### Presentations & Events

Hodgson Russ/FAE COVID-19 Webinar Series  
April 1 & 2, 2020

NYSBA: Estate Planning and Will Drafting  
Albany, New York, April 12, 2016