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ESTATE & TAX PLANNING
PRACTICE GROUP

For nearly 200 years, attorneys at Fletcher Tilton have counseled individuals on how to manage and protect their assets, minimize their tax burden and preserve their wealth for both their needs and those of future generations. Our attorneys work closely with our clients, their accountants, insurance agents, and financial advisors to insure the full coordination and successful implementation of their estate plans. Today, the Estate, Tax and Financial Planning Practice Group of Fletcher Tilton is one of the most respected estate, tax and financial planning groups in New England. Among the many services we provide are the following:

ESTATE PLANNING

The Estate, Tax & Financial Planning Group prepares wills and various forms of trusts to reduce or eliminate federal estate taxes, including Revocable Trusts, QTIP Trusts, Irrevocable Life Insurance Trusts, Qualified Personal Residence Trusts (QPRTS), Charitable Lead Trusts, Unitrusts, and Private Foundations. We also counsel clients on valuation strategies such as family limited partnerships and corporate recapitalizations.

FAMILY TRANSFER PLANNING

Central to many estate plans is a program of gifting assets from one generation to the next. These gifts may be cash, marketable securities, closely-held stock or real estate. Our estate planning attorneys and paralegals help clients to value the assets being gifted (offering advice on applicable minority or marketability discounts where appropriate) and will prepare the necessary federal gift tax returns. We also utilize Generation Skipping Trusts (so-called Dynasty Trusts) as a way of removing funds from the taxable estate of both grantors and their children.

BUSINESS SUCCESSION PLANNING

We offer experienced counsel to business owners on the use of sophisticated estate planning techniques to accomplish the transition of ownership and control to family members or employees.

MEDICAID PLANNING

Our up-to-date knowledge of Medicaid benefits and qualification requirements allows us to advise clients on how their currently owned, or previously transferred, assets can affect eligibility.

DISABILITY PLANNING

We draft durable powers of attorney, health care proxies, and living wills to address incapacity and quality of life issues. Our experience includes Supplemental Needs Trusts which are designed to meet the needs of those who may be institutionalized.

FINANCIAL MANAGEMENT

We assist many of our elderly clients with their personal financial affairs including income collection, payment of household bills, payroll and withholding issues for their household employees.

TAX PLANNING AND MANAGEMENT

The firm operates one of the region's largest tax departments including tax attorneys, CPA's and accountants on staff who prepare more than 600 tax returns annually, from simple individual returns to consolidated tax returns for large multinational corporations. In addition we prepare specialized returns for the various corporations, partnerships, private foundations, charitable remainder trusts, and limited liability companies we represent.