# Private Client Services

McCAUSLAND
KEEN + BUCKMAN

**Our attorneys collaborate to provide a multi-disciplinary range of legal services to high-net-worth individuals, family offices and other private clients. We guide clients through wealth transfer options, structured investment strategies, strategic acquisition of assets, business succession planning and a broad range of tax issues.**

We are accustomed to working alongside our clients' other professional advisors as team members, in whatever capacity we are needed – whether to provide guidance on a single transaction or advice and planning for future generations. No matter what, our clients' trust is of paramount importance.

### Lifestyle Asset Management

We represent individuals in the purchase, financing and ownership of aircraft, yachts, art, equine and equine properties, vacation properties and other investments, including purchasing and owning fractional interests in such investments. When clients choose to dispose of these lifestyle assets, we guide them through the sale and negotiate on their behalf to ensure value is appropriately returned. In addition, our lawyers draft and negotiate contracts to ensure protection of the personal security of our clients.

### Philanthropic Endeavors

We counsel our clients on charitable giving techniques and further their philanthropic goals through charitable lead and remainder trusts, among other strategies. Our lawyers guide clients through the creation of private foundations, donor advised funds and grant awards.

### Real Estate

Our experienced real estate attorneys guide clients through each phase of a real estate transaction. We coordinate with our Tax and Trust and Estates groups to acquire, sell or execute the transfer of land holdings and legacy properties and to structure tax-deferred property exchanges. We represent our private clients in the acquisition of all manner of commercial and residential real estate, as well as their equity investments in real estate holding companies and acquisition vehicles. Our experience also includes protecting property through creative use of conservation easements, restrictive covenants and other techniques.

### Tax

Due to the highly complex and specialized nature of taxation, individuals, family businesses and, often, their accountants rely on our counsel to assess and mitigate tax issues and challenges. We partner with our clients and their professional advisors to achieve tax-favorable solutions specific to their unique needs. We also represent clients in tax controversies on the federal, state and local levels.

### Trust and Estate Planning and Administration

With decades of experience creating and overseeing plans for wealth preservation and transfer, our trust and estates lawyers handle all phases of estate planning and administration. In addition to drafting wills, trusts, powers of attorney and living wills, we work with executors and trustees on all phases of administration, including collecting assets, paying outstanding debts and obligations, and making distributions to beneficiaries. Our goal is always to provide the best quality guidance while minimizing applicable income, gift and estate taxes.

### Wealth Protection and Preservation

Using a full range of wealth transfer strategies, we work with clients to ensure their assets are safeguarded and distributed in alignment with their interests. Our experience includes the structuring of family limited partnerships, dynasty trusts, life insurance trusts, grantor trusts and revocable trusts as well as pre- and post-nuptial agreements. We provide advice on business succession planning, gift programs and asset protection and are adept navigators of philanthropic giving. We also advise closely held businesses on transfer and buy-sell considerations and assist in drafting sophisticated shareholder and operating agreements. Our lawyers counsel private foundations on formation, tax and compliance issues.