# Trust, Estate & Charitable Planning

## We partner with individuals and families today to build a legacy for tomorrow.

Gray Plant Mooty's Trust, Estate and Charitable Planning team works closely with individuals, families, and their professional advisors, in Minnesota and North Dakota, as well as across the United States, to accomplish their personal, financial, and philanthropic goals.

Our attorneys recommend, prepare, and administer estate plans that:

- Pass on family values
- Provide for the care and support of family members and friends
- Transfer assets
- Transition the family business
- Benefit charities
- Minimize income taxes and estate and gift taxes

## Building and Protecting Your Wealth is a Shared Goal

Our clients are owners of established, privately held and family-owned businesses; successful entrepreneurs; professional services practitioners; and C-level executives of global Fortune 100 corporations. We serve the estate planning needs of married couples with young children and basic estate planning needs to large, multigenerational families with highly sophisticated wealth transfer objectives. What all share in common is a desire to build and preserve their wealth, provide for future generations and leave a lasting legacy aligned with their values—and we are here to help them achieve it.

## One of the Midwest's Most Experienced Trust and Estate Law Practices

Ours is not only one of the largest and most respected trust and estate law practices in Minnesota, North Dakota, and the Midwest—we're also among the most experienced. Our estate planning attorneys have deep experience in specialized areas of estate planning, including charitable planning, real estate, wealth transfer, and estate and gift tax audits.

And, in addition to practicing law, several of our attorneys have advanced degrees in accounting and taxation and hold leadership roles in the premier professional associations shaping the industry, such as the American College of Trust and Estate Counsel.

## Clients Benefit from the Wisdom of the Group

Whether you are an executive desiring to protect assets or transfer a business, a multigenerational family with a complex financial portfolio managed within a family office, or an up-and-coming professional establishing a first will for your young family, you will benefit from our multidisciplinary team-based approach—it's one that sets us apart from our peers at other firms. Drawing upon the collective wisdom and experience of the team, our attorneys work together to craft personalized estate planning and charitable giving strategies to help individuals and families meet their unique goals.

And, as appropriate, we closely collaborate with our clients' other advisors—personal and family attorneys, bankers, financial planners, accountants, and family office administrators—to ensure an integrated estate planning strategy and a coordinated implementation.