Unruh Turner Burke & Frees
Attorneys at Law

Trust, Estate & Wealth Preservation

Our Firm's team of trust, estate and wealth preservation attorneys guide clients through the process of trust and estate planning as well as more sophisticated asset protection and federal estate tax planning strategies. We also represent corporate and individual fiduciaries including guardians, executors and trustees and assist them in handling all aspects of estate and trust administration, wealth preservation, business succession and asset protection planning.

We help you to identify your goals and to achieve those goals and savings for your heirs on probate fees, taxes and administrative expenses.

Our attorneys approach the estate and trust planning process in a comprehensive and holistic way. We focus on identifying the clients' desires for his or her spouse, children, grandchildren, or other heirs and future generations and help them to determine what their own needs will be. Our attorneys then seek to integrate and balance the client's desires in a manner that will, whenever possible, produce Federal Estate or Pennsylvania Inheritance Tax savings as well as asset protection.

We work together with our clients and their other advisors in financial planning, insurance, and accounting to achieve our clients' goals, minimize wealth transfer taxes and, whenever possible, to protect assets from lawsuits, claims and business and personal liability exposure.

Protecting children and future generations until they reach appropriate ages or skill levels through trusts is a frequent goal of our clients and our lawyers regularly prepare trusts designed to effectively accomplish this. Many clients also want to protect their heirs from divorce and other creditors' claims and our lawyers will help you to develop effective strategies and tactics to achieve these goals.

A constantly changing Federal Estate tax and generation skipping transfer tax remains a great burden to the estates of owners of closely-held or even publicly-traded companies. For that reason, our attorneys strive to provide clients with a number of estate planning options which include the use of family limited partnerships, irrevocable life insurance, and dynasty trusts, qualified personal residence trusts and other planning techniques.

Our estate planning attorneys will help clients implement plans ranging from very simple to sophisticated with advice and documents appropriate for the particular planning needs, including:

- Wills
- Revocable living trusts
- Irrevocable trusts including Grantor Trusts and GRATS

- **Revocable life insurance trusts**
- **Qualified personal residence trusts**
- **Dynasty trusts and asset protection planning through trusts**
- **Elder law planning**
- **Multi-generation trusts**
- **Qualified trusts for disabled children or adults**
- **Charitable remainder trusts**
- **Durable powers-of-attorney**
- **Living wills**
- **Advanced medical directives**

Attorneys

David M. Frees, III
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