

Truſts & Eſtates

Jones & Keller's Truſts and Eſtates attorneys provide comprehensive eſtate planning ſervices to eſtablish and implement efficient individual and multigenerational ſucceſſion planning. We work cloſely with our clients and their families to provide planning which meets the current and future income needs of the clients as well as their tax, familial, buſineſs and charitable goals and objectives.

The Truſt and Eſtates attorneys understand that effective ſucceſſion planning does not end with a Laſt Will and Teſtament. There are a myriad of ſervices which are neceſſary to ensure that a well drafted Laſt Will and Teſtament achieves the client's ultimate goals. The Truſts and Eſtates attorneys also represent eſtates in probate and truſtees in the administration of truſts.

Jones & Keller's Truſts and Eſtates attorneys provide ſuch additional ſervices as:

- Implementing aſſet transfers ſo that the eſtate plan represented in the Laſt Will and Teſtament can be achieved.
- Advise regarding the impact of qualified retirement plans and the means for minimizing income taxation of ſuch plans.
- Development and preparation of efficient eſtate plans for high net worth individuals.
- Representation of fiduciaries in the administration of large and complex eſtates and truſts.
- Defense of audits of Eſtate Tax, Gift Tax and Fiduciary Tax returns brought by the Internal Revenue Service and the State of Colorado.
- Representation of Truſts and Truſtees in litigation and divorce actions to protect the aſſets of Truſts.
- Representation of individuals and fiduciaries in all aſpects of litigation relating to the interpretation and administration of truſts and eſtates in the State of Colorado.
- Eſtablishing and implementing complex gifting ſtrategies for the multigenerational transfer of wealth to minimize gift and eſtate taxes.
- Preparation of federal and Colorado Eſtate Tax, Gift Tax and Fiduciary income tax returns.
- Eſtablishment of family investment vehicles ſuch as family limited partnerships and limited liability companies.
- Eſtablishment and implementation of charitable contribution vehicles ſuch as family foundations, donor advised funds and direct gifts.

Attorneys

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