

CLOSELY-HELD BUSINESS & TAX PLANNING

As one of the East Coast's largest and most experienced private wealth practices, Moore & Van Allen's Wealth Transfer group provides sophisticated, proactive and personable estate, tax, charitable and business planning for our clients—high net-worth individuals and families, senior executives of public companies and closely-held businesses.

We routinely implement creative, cutting-edge solutions for business succession, tax planning, estate planning, charitable planning and asset protection planning that add significant value for our clients. We represent clients in numerous jurisdictions, with a particular emphasis on the Southeast.

We generally develop extended relationships with our clients who come to rely on us to coordinate all their legal needs with other MVA practices for litigation, finance, corporate, securities, environmental, real estate and governmental matters. When applicable, we also work collaboratively with the client's other advisors, including other counsel, accountants and investment and insurance advisors.

In individual tax and estate planning matters, our attorneys advise on:

- Wills
- Revocable or "living" trusts, typically in conjunction with "pour-over" wills
- Powers of attorney, health care powers of attorney, living wills and HIPAA authorizations
- Irrevocable trusts, including life insurance trusts, grantor trusts, dynasty trusts and trusts funded with closely held business interests
- Charitable remainder trusts and charitable lead trusts

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