PagnatoKarp
Transparent Family Wealth Advisors

LEGAL EXPERIENCE

Expert advice to **guide** and **protect** your family's path.

Estate Plan Review

Detailed review of your existing Estate Planning documents:

- Illustrate key points of your Estate Plan in a flowchart and summary

Trust and Estate Planning

Coordinated support from Legal, Planning, Tax and your Family Coach to best position you for:

- Life-changing events, such as business transactions, inheritance, birth of children/grandchildren, marriage, divorce or death
- Ownership, trustee/executor, and beneficiary review
- Wealth transfer and legacy planning
- Estate and gift tax calculations
- Potential tax minimization strategies
- Estate Gift and Generation Skipping Transfer ("GST") tax planning

Legal Document Drafting[1]

Prepare and/or refresh, then execute your baseline Estate Planning documents:

- Wills
- Revocable Trusts
- Irrevocable Life Insurance Trust
- Powers of Attorney
- Living will and Advance Medical Directives

Additional advanced Estate Planning documents may include:

- Dynasty Trust, Grantor-Retained Annuity Trust ("GRAT"), Family Limited Partnership or LLC, Private Annuity, Charitable Remainder Trust, Charitable Supporting Organization, Charitable Family Foundation, Charitable Lead Trust, Intentionally Defective Irrevocable Trust (IDIT) Installment Sale, Grantor Retained Income Trust (GRIT)/Qualified Personal Residence Trust (QPRT), Self-Canceling Installment Note (SCIN), Individual Retirement Account (IRA) Legacy Trust

Review and evaluate your business transactional documents, including:

- Business formation, business sale, investment documents
- Transaction structuring and advisory

Legal Consulting[1]

Legal consulting for special circumstances:

- Special Needs Trust planning for family members with physical, developmental, behavioral/emotional or sensory impairment disorders
- Consulting for same-sex or unmarried couples

[1] Client must sign Engagement Letter with outside law firm, Zell Law, PLLC. The Engagement Letter covers the duration you are a PagnatoKarp client.

pagnatokarp.com 703-468-2700
11951 Freedom Drive, Suite 1260, Reston, VA 20190

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