SEIGFREID BINGHAM
LEVY SELZER & GEE

ESTATE PLANNING
BUSINESS SUCCESSION PLANNING
PROBATE & TRUST

Big enough to take care of your business.

Small enough to take care of you.

AN ESTATE PLANNING PRACTICE THAT RIVALS ALL OTHERS

The estate planning practice of Seigfreid, Bingham, Levy, Selzer & Gee provides comprehensive and sophisticated knowledge, experience and judgment. Unlike other firms, we combine this in-depth experience with an entrepreneurial, client-focused style of practice dedicated to achieving our clients' goals.

We care about our clients' goals and interests like they are our own and consistently deliver practical, results-oriented legal services and advice. We maintain long-term client relationships and obtain new clients through referrals from satisfied clients.

By encouraging our attorneys to develop both broad business law and estate planning experience and specialty knowledge, we offer you the same wide range of legal services as large firms, but with greater efficiency and focus on our clients' overall goals and strategies at significantly less cost.

We are a general practice firm whose clients include individuals, executors, trustees and business owners. We advise our clients through all life cycle events.

OUR PRACTICE SERVICES

We provide specialized knowledge and practical, experience-based advice on a broad range of issues and strategies including:

ESTATE PLANNING:

Wills, revocable trusts, irrevocable life insurance trusts (ILITs), powers of attorney, living wills, family limited partnerships (FLPs), irrevocable trusts, qualified personal residence trusts (QPRTs), special needs trusts, guardianships and conservatorships, charitable foundations, charitable remainder trusts, grantor retained annuity trusts (GRATs), generation-skipping transfers, intentionally defective grantor trusts (IDGTs), dynasty trusts, techniques for avoiding probate, and strategies for minimizing and paying estate and gift taxes.

ESTATE & TRUST ADMINISTRATION:

Probate/estate administration, trust administration, estate and trust accountings, guardianships and conservatorships, estate and trust income tax returns, federal and state estate tax returns, and beneficiary distributions.

BUSINESS SUCCESSION PLANNING:

Selection and formation of business entities, purchase of a business, general business and tax advice, development of business succession plans including buy-sell agreements, deferred compensation plans, life insurance strategies, gifting of ownership interests in the business, sale of the business, and tax efficient transfer of the business to the next generation or a valued employee.

LIFETIME GIFTING:

Annual exclusion gifts, Section 529 educational plans, educational trusts, family limited partnerships (FLPs), irrevocable trusts, qualified personal residence trusts (QPRTs), grantor retained annuity trusts (GRATs), private foundations, donor-advised funds, charitable remainder trusts (CRTs) and other charitable gifting, generation-skipping transfers, intentionally defective grantor trusts (IDGTs), dynasty trusts, and lifetime exemption gifts.

RETIREMENT PLANNING:

Roth IRAs, traditional IRAs, employee benefit distribution options, analysis of retirement options, and selection of beneficiaries (individuals, trusts and charities).

ASSET PROTECTION:

Prenuptial agreements, asset allocation, special needs trusts, irrevocable trusts, and spendthrift trusts.

CHARITABLE GIVING:

Outright gifts during life or at death, donor-advised funds, private foundations, charitable remainder trusts (CRTs), and charitable beneficiaries of IRAs.

TAX RETURN PREPARATION:

Estate and trust income tax returns, federal and state estate tax returns, and estate and gift tax audits.

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