

# Estate Planning & Administration

Bailey Glasser provides comprehensive legal counsel in matters of estate and trust planning, and estate administration (probate). Our experience in tax and business issues informs the structure for the estate plans we develop for individuals, families, and business owners. We understand how estate tax and probate work, and we know how to structure estate plans that take full advantage of key state and federal laws to meet our clients' needs and goals.

Our client base is complex and based across the US and overseas. We tailor our approach to the size and complexity of each client's estate. We believe in an efficient process and utilize simple, plain-language documents where possible, but we also apply cutting-edge tax and estate planning techniques when necessary to preserve the most value.

We also provide the following services:

- Trusts & Estates
- Asset Preservation
- Real Estate Trusts
- Special Needs Trusts
- Life Insurance Planning
- Philanthropy and Charitable Giving
- Business and Entity Planning/Structuring

## Experience

- Prepared tax-efficient estate planning documents for high-net-worth couple where one spouse moved to Florida and obtained residency there for tax purposes while other spouse remained resident in New York State for state tax purposes.
- Assisted high-net-worth client with contested gift-sale of multiple entity interests to grantor trust in exchange for promissory note.
- Assisted high-net-worth client with buyouts and consolidated sale to venture capital group of roughly a dozen fitness centers.

- Obtained zero tax due ruling from Scandinavian tax authorities based on recommended treaty position with respect to the estate of a dual citizen who died while residing in Finland.

### **News & Insights**

Bailey Glasser Adds Stephen Putnoki-Higgins; Creates New Estate Planning & Administration Practice

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