

Estate Planning & Administration

Bailey Glasser stands ready to help preserve hard-earned family wealth through comprehensive and compassionate legal counsel in matters of estate and trust planning, and estate administration (probate).

Our deep experience in all tax and business issues that may touch your personal and professional lives allows us to create customized and holistic estate plans for individuals from all walks of life. We work with clients before, during, and after life transitions to provide planning documents and services that provide peace of mind and flexibility and endeavor to preserve familial harmony, but always with a surgical eye toward preserving wealth and optimizing all available tax, asset-protection, and non-tax benefits.

We help clients across the US and overseas, tailoring our approach to the size and complexity of each client's estate. We are accessible and efficient as we walk our clients through each step of the process, and we endeavor to keep things as simple and cost-effective as possible, without overlooking the important details.

We also provide the following services:

- Wills, Trusts & Estates
- Asset Preservation
- Real Estate Trusts
- Special Needs Trusts
- Healthcare & Power of Attorney Documents
- Pre & Post-Nuptial Agreements
- Estate & Gift Tax Return Review & Preparation
- Life Insurance Planning
- Philanthropy & Charitable Giving
- Business & 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
09.08.2020