Estate Planning

Roetzel's Estate Planning Team is committed to understanding your unique wealth planning priorities and objectives, particularly when it comes to family succession planning. We take the time to get to know you, your family, and your business, allowing us to craft customized strategies that maximize benefits while respecting the personal and confidential nature of these matters. With offices in Ohio, Florida, and Illinois, we offer access to counsel admitted in multiple states, bringing national expertise to the table. Most of our attorneys have decades of experience in estate planning, and our team includes professionals with CPA certifications, master's in taxation degrees, and specialists in estate planning and federal taxation.

Our attorneys focus on creating flexible estate and business plans that adapt to life's uncertainties, shifting economic climates, changing laws, and evolving family dynamics. We emphasize minimizing taxes and ensuring that your wealth is preserved and effectively transferred to the next generation. With decades of experience and a deep understanding of multigenerational wealth planning, we provide practical solutions that support your family's long-term goals.

What We Do

- Protect assets through tailored planning
- Develop and implement both basic and sophisticated estate plans
- Plan charitable giving using lead and remainder trusts, private foundations, donor-advised funds, and public charities
- Create and administer nonprofit entities, including obtaining tax-exempt status
- Provide eldercare legal services
- Represent trustees and beneficiaries in fiduciary litigation
- Administer guardianships
- Litigate guardianship disputes
- Plan for multigenerational wealth transfer
- Advise on personal and fiduciary income tax planning
- Plan with a variety of trusts, including GRATs, ILITs, QPRTs, lifetime and testamentary CLTs and CRTs, dynasty trusts, intentionally defective grantor trusts, SLATs, QDOTs, Ohio Legacy Trusts, and HEETs
- Draft premarital and postnuptial agreements
- Administer probate
- Plan tax and succession strategies for closely held businesses and business owners
- Administer trusts

Our Experience

- Assisted clients in reducing or eliminating state and Federal estate, gift and generation-skipping transfer taxes
- Implemented wealth succession plans for families at the first, second, and third generation levels
- Prepared comprehensive and flexible succession plans for owners of closely held businesses
- Represented clients in state and IRS reviews of transfer tax returns at both the audit and appeals levels
- Prepared wealth protection plans under the Ohio Legacy Trust Act and the asset protection laws of a number of other states
- Worked with individual donors to structure and maximize charitable gift benefits

- Implemented charitable plans to reduce income taxes during lifetime and transfer taxes at death
- Assisted with the sale and purchase of closely held business interests
- Through the use of voting and nonvoting stock, flexible buy-sell agreements, company spinoffs, and/or insurance planning to fund puts and calls and to balance the transfer of income and non-income producing assets, developed organization and succession plans for family businesses in which not all family members are actively involved
- Assisted executors, trustees, administrators, and guardians in carrying out their responsibilities efficiently and in accordance with state and federal laws
- Assumed responsibility for the record-keeping functions of trustees by utilizing paraprofessionals
- Assisted individuals, corporate fiduciaries, and other entities in interpreting and applying federal, state, and local tax laws pertaining to probate matters
- Worked cooperatively with other professional advisors and attorneys to ensure that our clients' estate and business plans are properly integrated into their financial structures
- Worked closely with major New York City and Chicago auction houses for consignment of significant artwork, antiques, and collectibles
- Appeared in a wide range of contested guardianship issue proceedings, including capacity determinations and the marshalling and recovery of misappropriated assets
- Represented individual and corporate fiduciaries in challenges to the validity, interpretation, and construction of estate planning documents, as well as in claims challenging the proper exercise of duties
- Represented a client in an IRS gift tax audit of a discounted entity transaction and settled at a discount rate resulting in a total asset transfer of more than $1.5 million at a tax cost of less than $26,000
- Represented a corporate fiduciary in a will contest action with an aggressive strategy that resulted in a settlement in less than a year at 2.3% of original claim
- Implemented a liability protection plan for a family business with over 100 locations
- Assisted with the transfer, title of assets, and beneficiary designations to completely avoid probate administration upon the death of a client, allowing surviving family members immediate access to assets and saving court costs and attorneys’ fees
- Implemented rollover GRAT planning for a family resulting in the transfer of more than $5 million of wealth gift tax-free