ADLER POLLOCK & SHEEHAN P.C.

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Trusts & Estates

ATTORNEYS

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OVERVIEW

The AP&S Trusts & Estates Group is recognized for sophisticated and creative planning techniques that minimize your taxes and maximize your control of your assets. That's why business owners, professionals and others with significant wealth or property choose us to achieve their long-term financial objectives.

We work to understand your unique situation and provide customized estate planning and wealth transfer strategies to realize your financial goals, for the benefit of you, your family, your business and the organizations you support.

For new or revised estate plans, we devise tax-efficient business succession for closely held businesses, smart charitable giving strategies, and innovative trust arrangements. We can collaborate with your accountant, financial planner, insurance consultant and/or broker to create a seamless financial plan that meets your objectives.

Areas of Concentration

- Estate planning
- Financial planning
- Long-term care planning
- Retirement planning
- Trusts
- Wealth preservation/ Asset protection
- Charitable giving
- Insurance planning
- Closely held business succession and planning

REPRESENTATIVE MATTERS

- Drafting wills and trust documents.
- Advising as to the strategic role of life insurance in estate planning, including the use of irrevocable trusts.

- Planning for incapacity or death.
- Planning for clients with dependents or family members with special needs.
- Representing descendants and guardianship estates in probate proceedings, including contested matters.
- Representing decedents' estates including preparation of fiduciary income and estate tax returns.
- Representing trustees in the administration of their duties as fiduciaries.
- Lifetime planning, including gifts and gift tax returns.
- Elder law, including Medicaid planning and Medicaid qualification.
- Minimizing asset exposure to creditors and protecting assets.
- Specialized income and estate planning for transferring closely-held businesses to the next generation and buy-sell agreements.
- Charitable giving, including the formation of tax-exempt corporations and charitable trusts.
- Executive and nonqualified deferred compensation, split-dollar funding and/or life insurance, and other fringe benefits for business owners and key employees.

SEMINARS / PUBLICATIONS

Publications

- Kristin N. Matsko, "Living Wills, Durable Powers of Attorney for Health Care, and Durable Financial Powers of Attorney," A Practical Guide to Estate Planning in Rhode Island (MCLE)
- Kristin N. Matsko, "Personal Representatives' Qualifications and Bonds," A Practical Guide to Probate in Rhode Island (MCLE)
- David T. Riedel Hans Lundsten and Joseph R. Marion, Insight on Estate Planning.
- David T. Riedel, Wills, Trusts and Gifts, which analyzes Rhode Island cases and statutes.

Seminars

- David T. Riedel, Succession Planning Options for the Private Business Owner, RI Bar Association Annual Meeting, June 2012.
- David T. Riedel, Dealing with CPA's – Estate Planning, RI Bar Association Annual Meeting, June 2011.
- David T. Riedel, Same-Sex Marriage in New England: New Protections and New Planning Challenges, 11th Annual Estate Planning Conference, Massachusetts CLE, January 8, 2010.

AWARDS

- Rated Tier 1 Metropolitan “Best Law Firm” 2015 by Best Lawyers®.