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ESTATE & WEALTH ADVISORY

The Estate and Wealth Advisory Group includes experienced and committed lawyers who are focused on being trusted and skilled advisors. It is positioned to provide nuanced, appropriate and effective advice to assist in preserving and transitioning assets, whether personal assets or business assets, as clients' assets, businesses, and family evolve.

Recognizing that planning and preservation is a process and not an event, the Estate and Wealth Advisory Group works with its clients and their advisors, such as accountants, financial advisors, insurance advisors, and family enterprise advisors, to create collaborative and tailored results. The firm is geared to provide planning tools and strategies for individuals and private business enterprises.

The Estate and Wealth Advisory Group has regular exposure to, and works in conjunction with, cross-border advisors, including US legal and tax specialists, to assist American and Canadian clients with crafting and implementing planning that involves their cross-border needs.



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Family

Personal Planning: Wills, Powers
of Attorney, and Health Care

Private Business and Family
Enterprise Planning

Succession Planning for Privately
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Trusts

Wealth Preservation



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