VORYS

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Estate Planning

Vorys provides a full range of estate planning and lifetime giving services designed to achieve the personal, economic and tax planning goals of our clients. Our lawyers often work closely with our clients' accountants, financial planners, investment advisors and life insurance professionals.

Our basic estate planning services include preparing wills, revocable trusts, financial powers of attorney, health care powers of attorney and living wills. We coordinate the dispositive terms of these estate planning documents with our clients' asset ownership and beneficiary designations to achieve our clients' goals and objectives.

Our advanced estate planning services include developing and implementing documents and plans that minimize the payment of gift, estate and generation-skipping transfer taxes. Our lawyers have considerable knowledge and experience with the use of qualified personal residence trusts (QPRT), irrevocable life insurance trusts (ILIT), intentionally defective grantor trusts (IDGT), grantor retained annuity trusts (GRAT), family limited partnerships (FLP), family limited liability companies (FLLC) and dynasty trusts. Our lawyers also specialize in succession planning for owners of closely-held businesses, including the preparation of shareholder and buy-sell agreements.

Our charitable estate planning involves all types of charitable vehicles and transfers. We regularly advise clients with respect to the creation of and transfer of assets to charitable remainder trusts (CRAT or CRUT), charitable lead trusts (CLAT or CLUT), charitable gift annuities, donor-advised funds, supporting organizations and private foundations.