Private Wealth Management Prince George

Private Wealth Management Prince George - We are able to assist our clients through our Wealth Management practice in the areas of wealth preservation, estate planning, business succession, and charitable endeavors. In these areas, we provide comprehensive knowledge, expertise and guidance to the various philanthropists, executives, entrepreneurs, and high net worth individuals. We work closely along with our clients' financial advisors and accountants to deliver quality results and service.

Charities and Philanthropy
Vital to personal wealth planning is planned giving. Clients should know the legal and tax implications of philanthropy. When clients want to establish techniques of planned giving such as charitable foundations, we advise them about administrative, structuring, and compliance concerns.

Family Estate & Trust Litigation
In acting as counsel during litigations, arbitrations and mediations, we are knowledgeable before all levels of the courts and other administrative tribunals.

Family Business Transition and Succession Planning
We provide suggestion to family-owned and other closely held businesses with our wealth management services. We assist family enterprises to be able to structure or restructure their businesses in the most tax-efficient way. Our expertise includes inter-generational transitions in addition to transitions to outsiders in a wide range of endeavors and industries. These transitions are facilitated through arrangements like for example corporate reorganizations, shareholder's agreements, the settlement of trusts, and management agreements. Comprehensive solutions frequently require other experts in, like for example, real estate or matrimonial law. Our company has these experts as well as professionals in business tax and law.

Individual Estate Planning and Wills
We understand that those individuals and businesses have amassed great wealth will frequently face tax and legal matters as well as sensitive inter-personal dramas. Our teams of professional lawyers are really successful at minimizing legal risks, reducing family distress and maximizing tax-efficiency while creating and implementing comprehensive, flexible, and consistent plans that match our clients' goals and values. The purchase or sale of a new business, a divorce, an inheritance - these are all major financial events in anybody's life. We provide individualized and effective guidance in such cases.

Trusts
In order to assist clients in their business and personal affairs, we will frequently advise concerning private trusts as a flexible tool. For the trustees and beneficiaries of private trusts, we also provide ongoing suggestion. We are knowledgeable at creating family trusts to facilitate the inter-generational transfer of wealth. There are various other types of trusts wherein our practitioners often assist clients, like for example voting trusts, trusts for disabled beneficiaries, blind trusts, spendthrift trusts, asset protection trusts, and immigration trusts. For clients interested in philanthropy, we can establish charitable trusts.

In the context of tax planning, private trusts are a helpful tool: we help our clients about tax planning opportunities such as property transfer tax avoidance and probate fee, income splitting, inter-provincial rate shopping, and accessing multiple capital gains exemptions.

We have litigators who are skilled at trust litigation in situations where the trust may be used as both a defense and a weapon. We provide advice and counsel in cases wherein trust expertise is required in matrimonial planning and dispute resolution.

Wealth Preservation
Our practice also assists those clients who are under challenge from future heirs, or attack from creditors. The goal of our firm is to preserve the wealth of our clients by using techniques such as prenuptial agreement or establishment of trusts.