Private Wealth Management Langley

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

Charities and Philanthropy
Integral to personal wealth planning is planned giving. Clients need to know the tax and legal implications of philanthropy. When clients would like to establish methods of planned giving like charitable foundations, we advise them about compliance, structuring and administrative concerns.

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

Family Business Transition and Succession Planning
We offer advice to family-owned and other closely held businesses with our wealth management services. We help family enterprises so as to structure or restructure their companies in the most tax-efficient way. Our knowledge includes inter-generational transitions as well as transitions to outsiders in different industries and endeavors. These transitions are facilitated through arrangements like corporate reorganizations, shareholder's agreements, the settlement of trusts, and management agreements. Comprehensive solutions frequently need other professionals in, for instance, real estate or matrimonial law. Our company has these professionals as well as experts in business law and tax.

Individual Estate Planning and Wills
We know that clients who have accumulated significant wealth face difficult legal and tax concerns along with sensitive inter-personal dilemmas. Our professionals know how to maximize tax-efficiency, reduce legal risk, and decrease family distress while designing and implementing plans that are comprehensive, flexible, and consistent with our clients' values and goals. The sale or purchase of a new business, a divorce, an inheritance - these are all major financial events in anyone's life. We provide effective and personalized guidance in such situations.

Trusts
To help clients in their business and personal affairs, we will frequently advise on private trusts as a flexible tool. For the trustees and beneficiaries of private trusts, we also offer ongoing advice. We are experienced at creating family trusts to be able to facilitate the inter-generational transfer of wealth. There are several other types of trusts with which our practitioners regularly assist clients, like for instance voting trusts, trusts for disabled beneficiaries, blind trusts, spendthrift trusts, immigration trusts and asset protection trusts. For clients interested in philanthropy, we could establish charitable trusts.

Private trusts are a useful tool in the tax planning context: we advise 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.

Our lawyers are knowledgeable in trust litigation in situations whereby the trust is being utilized offensively as a weapon and defensively. We give counsel and give our suggestion for matrimonial planning and dispute resolution cases.

Wealth Preservation
Our group members help clients who are under challenge from future heirs, or attack from creditors. Our priority is the preservation of individual wealth through techniques like establishment of trusts or prenuptial agreements.