WINSTEAD

Private Wealth

Our high net worth clients' needs are often complex, requiring a team approach to identify and implement efficient solutions to achieve their objectives. Winstead's Private Wealth Industry Group is an interdisciplinary team of attorneys who support and provide thoughtful guidance to high net worth individuals and families regarding their company operations, family office structures, investments, trust and estate administration, and wealth planning. In addition, our Private Wealth Industry Group represents nonprofit organizations, corporate executors, and corporate trustees.

When legal problems and potential conflicts arise, our Private Wealth Industry Group has the experience to evaluate and resolve them, addressing a wide variety of legal disputes for our clients related to their businesses, investments, and conflicts with fiduciaries, heirs, or relatives. Our Private Wealth trial attorneys are experienced in contesting regulatory claims; litigating trust, estate, and probate disputes; handling IRS controversies; and addressing allegations of breach of fiduciary duty and other claims arising out of private company ownership, investment issues, and trust and estate administration. When a Business Divorce is required by majority owners and/or substantial minority investors in private companies, our attorneys are skilled at achieving the separation of interests held in these private companies in creative and cost-effective ways to optimize value. Our Business Divorce attorneys are also frequently called on to assist family law counsel and their clients with complex issues involving the division of business assets in the divorce proceeding.

Members of our Private Wealth Industry Group have a national reputation for their experience, thought leadership, and goal-oriented representation of clients. Leveraging our team approach, our group works to achieve clients' objectives.

Specifically, we provide legal advice with regard to:

- Charitable and Nonprofit Organizations
- Closely Held Business Formation, Administration and Corporate Support
- Closely Held Business Disputes / "Business Divorce"
- Corporate Trustee Advice and Counsel
- Estate Litigation
- Estate Planning and Wealth Preservation
- Estate and Trust Administration
- Family Office Structuring
- Family Office Employment Structure and Compensation
- International Tax and Planning Implications
- Investments in Private Funds and Private Companies
- Internal Fund Formation
- Taxation - Federal Estate, Gift, and Generation Skipping Transfer Tax
- Taxation - Federal Income Tax
- Tax Litigation - Estate, Gift, and Generation Skipping Transfer Tax
- Tax Litigation - Income Tax
- Trust Litigation
- Wealth Management Advisory Arrangements