

Wealth Preservation

Where Clients' Wishes and Estate Planning Work. Together.

In our counsel to high net worth individuals, fiduciaries, financial institutions and charities, Winstead attorneys develop, implement and defend innovative and comprehensive planning strategies to address clients' wealth transfer and asset protection objectives in a tax efficient manner. Several of our attorneys are focused on defense of clients in IRS audits and representation of individual and entity fiduciaries in matters related to estates and trusts.

With a particular focus on representing the super affluent, Winstead's Wealth Preservation Practice Group counsels closely held business owners, investors, executives of publicly traded companies and their families in all aspects of wealth preservation, protection and transfer, and related litigation matters. Our practice experience and background includes:

- Estate Planning
- Business Succession Planning
- Buy/Sell Agreements, Transfer Restrictions and Rights of First Refusal
- Asset Protection Planning
- Emerging Business Planning
- Executive Planning
- Marital Property Planning
- IRS Controversy
- Transfer Tax Litigation
- Probate, Trust and Estate Administration
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- Tax Options and Stock Planning
- Charitable Planning
- Cross-Border Planning

Among our attorneys are (1) three Fellows (one of whom serves as a Regent) of the American College of Trust and Estate Counsel (ACTEC), (2) the Finance Officer of the ABA's, Real Property, Trust & Estate Law Section (RPTE), (3) a Council Director of the ABA's Tax Section, (4) former Chair of the ABA's Estate and Gift Taxes Committee, (5) former Chairs of the Houston and Dallas Bar Associations' Probate, Trusts and Estates Sections, and (6) one former Chair and one current Vice-Chair of RPTE's Tax Litigation & Controversy Committee. We remain in the forefront of developing and implementing defense of emerging wealth preservation and transfer strategies and in defending our clients' plans against individual and IRS challenges. We are frequent speakers before professional associations throughout the United States.

The Wealth Preservation Practice Group's services are enhanced by Winstead's firmwide knowledge resources in other practice areas such as corporate, tax, litigation, securities, executive compensation, finance, oil and gas, and real estate law.

We recognize that super affluent clients have numerous advisors (such as investment management, insurance, accounting professionals) and that clients are best served when all of their advisors work together. We focus on a "team approach"—working with clients' other advisors to ensure each client receives the best, most coordinated, and most defensible gift, estate, asset planning and business planning possible—while endeavoring to protect clients' privileges.

Estate Planning Questionnaire

If you would like to visit with us about your planning needs, please take a moment to complete our estate planning questionnaire for single persons or for married persons.

[Single Persons \(PDF file\)](#)
[Married Persons \(PDF file\)](#)

The questionnaire will help you organize your thoughts about estate planning and provide us information about your family and finances. Completing the questionnaire in advance of an initial conference with one of the attorneys in our practice group will allow the initial conference to be much more productive. If you choose to complete it, please fill it out as much as possible, either skipping or placing question marks on those items that seem inapplicable, or about which you may have questions or prefer not to answer. Please then provide a copy of your questionnaire to one of the attorneys in our Wealth Preservation Practice Group.