



# Trusts, Estates, Probate and Tax

BHGR's Trusts, Estate, Probate, & Tax Group is comprised of the most trusted, compassionate, experienced, and forward-thinking attorneys in Colorado and Wyoming.

BHGR's Trusts, Estate, Probate, & Tax Group represents individuals, families, and businesses seeking the highest-quality estate planning, probate and estate administration, trust administration, and complex wealth management and tax planning services.

## Focus Areas

### COMPLEX WEALTH MANAGEMENT & TAX PLANNING

Our attorneys advise local, national, and international, high-net-worth individuals and families in all aspects of sophisticated estate, tax, asset protection, and business planning. We assist clients in mitigating federal and state income tax using multi-jurisdictional tax and planning tools, including Wyoming trusts, private family trust companies, and situs planning. Our attorneys also counsel our clients on the use of trusts to mitigate taxes when selling closely held companies, selling business equity, or other types of liquidity events.

### ESTATE PLANNING

From simple to complex estate plans, we advise individuals on all aspects of estate planning, including asset protection planning, probate avoidance planning, and estate tax planning (including generation-skipping transfer (GST) tax planning). We also provide international succession planning for non-citizens and U.S. citizens owning property abroad. Our attorneys assist our clients with a wide variety of customized estate planning tools and documents including:

- Wills
- Living Wills
- Revocable ("Living") Trusts
- Irrevocable Trusts
- Irrevocable Life Insurance Trusts
- Grantor Retained Annuity and Unitrusts
- Qualified Personal Residence Trusts
- Sales to Grantor Trusts
- Charitable Lead Trusts
- Charitable Remainder Trusts

- Private Foundations
- Medical and Financial Powers of Attorney
- Advance Directives
- Declarations of Disposition of Last Remains
- Celebration of Life Decisions and Directions
- Delegations of Parental Powers
- HIPPA Authorizations and Releases
- Prenuptial and Marital Agreements
- Real Property Transfers
- Closely Held Businesses
- Family Limited Partnerships

### **PROBATE & ESTATE ADMINISTRATION**

Our attorneys counsel grieving clients on probate and estate administration following the death of a loved one. We have extensive experience with Colorado's probate code and considerable experience guiding personal representatives and heirs through both formal and informal, simple, and complex probate administrations.

### **TRUST ADMINISTRATION**

Our attorneys assist clients in Colorado and throughout the United States with trust administration. Our attorneys are well-versed in Colorado's Uniform Trust Code and routinely counsel clients serving as trustees as well as beneficiaries seeking to understand their interests in an inheritance. We guide our clients through the trust administration process, including collecting and inventorying assets, filing estate tax returns, negotiating settlement agreements, and making distributions to maintain asset protection and maximize tax efficiency.