



Estate Planning & Wealth Preservation

At Hinshaw, we provide the sound planning, strategic foresight and creative solutions required to capably manage and preserve assets. In doing so, we help business owners, real estate owners, executives and other individuals comprehensively plan for the present and future. More specifically, we help clients accomplish their goals tax-efficiently; assist in planning for the smooth transition of family businesses and assets; advise trustees and executors who administer trusts and estates of all sizes; and help individuals adequately provide for the care of loved ones, including those with special needs.

Traditional Estate Planning Services

The accumulation of assets and wealth comes from hard work and determination. So protecting the fruits of that labor and resolve is essential. We help business owners, executives, and individuals effectively plan for the financial ramifications of marriages, major lifetime events, disability and death. Our many traditional services include:

- Preparing wills and all types of revocable and irrevocable trusts, including irrevocable life insurance trusts and gift trusts
- Addressing marital trust issues related to second marriages and non-citizen spouses
- Disability planning, including preparation of powers of attorney for health care and property, living wills, and HIPAA authorizations
- Drafting prenuptial agreements

Sophisticated Services for Business Owners, Real Estate Owners, Senior Executives and High Net Worth Individuals

Business owners, real estate owners, senior executives, high net worth individuals, physicians and others frequently require specialized assistance to effectively preserve, and plan for the distribution and transition of, their significant assets and wealth. We help our clients preserve wealth for the next generation, protect their beneficiaries, avoid or help mitigate the taxable effects of various activities, accomplish effective generational transfers, and facilitate charitable gifting. Specifically, we help our clients by:

- Assisting with business and asset transition planning, including the use of buy/sell agreements and other tax-effective mechanisms such as sales to intentionally defective grantor trusts
- Planning for generation-skipping transfers and creating descendant trusts, including dynasty trusts
- Developing tax-efficient gifting strategies for the transfer of wealth, including the use of grantor retained annuity trusts and qualified personal residence

Service Area Contact

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Attorneys

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Related Services

Family-Owned Businesses

Related Industries

Equine



trusts

- Developing and implementing asset protection strategies
- Counseling on the formation and operation of family limited partnerships
- Creating charitable giving strategies, including the use of charitable remainder trusts and charitable lead trusts, and advising on the formation and operation of private foundations

Trust and Estate Administrative Services

Each trust and estate is unique. Serving as trusted advisors in administering the assets and activities of trusts and estates, we assist with a full range of distinctive opportunities and challenges. We build personal relationships with our clients so that we can best help them address sometimes conflicting interests and achieve their goals in the most prudent and financially wise manner. Among our many capabilities, we:

- Advise trustees and executors who administer trusts and estates of all sizes
- Counsel taxpayers regarding estate, gift, generation-skipping and income taxes, including individual and fiduciary income taxes
- Prepare gift and estate tax returns
- Advocate in estate controversies, trust controversies, and estate and gift tax audits

Services for the Elderly, Minors and the Disabled

We help clients adequately and sufficiently provide for their elderly, minor and/or disabled family members and other beneficiaries. Identifying and balancing sometimes competing goals of interested parties, we help our clients achieve their goals, preserve their assets for the long term and ensure the present and future well-being of their loved ones with special needs. Specifically, we help by:

- Advising regarding elder law issues
- Creating supplemental needs trusts and payback trusts for disabled individuals
- Establishing guardianships for minors and disabled adults and advising the guardians, personal representatives and conservators regarding administration issues

News

[Hinshaw Recognized as "Distinguished in Litigation" in BTI Consulting's Litigation Outlook 2024 Survey](#)
November 16, 2023

[Hinshaw Receives Recognition in 2024 "Best Law Firms" Directory](#)
November 2, 2023

[U.S. News – Best Lawyers Recognizes Hinshaw in 2023 "Best Law Firms" Directory](#)
November 2, 2022

[Rockford Park District Renames Park in Honor of Hinshaw Partner James Keeling](#)
April 18, 2022

[Hinshaw Recognized in 2022 U.S. News – Best Lawyers "Best Law Firms" Directory](#)
November 4, 2021

[Steven Cutler Discusses the For The 99.5% Act in FLN Presentation](#)
June 8, 2021



Hinshaw Partner James Lestikow Named Board Chair of IICLE®
January 11, 2021

Sixty-Five Hinshaw Lawyers Recognized in 2021 Editions of Best Lawyers and Best Lawyers: Ones to Watch
August 20, 2020

Hinshaw Partner James W. Keeling Named Rockford University Honorary Alumnus
October 16, 2018

Hinshaw White Paper Reviews New Partnership Audit Rules and their Impact on Partnerships and LLCs
November 7, 2017

Hinshaw's Rockford Seminar Series
October 9, 2017

Hinshaw Garners More Than Thirty Rankings in 2017 U.S. News - Best Lawyers® "Best Law Firms" List
November 1, 2016

Thirty Hinshaw Lawyers Named to 2017 Edition of The Best Lawyers in America®
August 15, 2016

James Lestikow Authors Article Examining Reasonable Compensation Fees for Illinois Trustees
April 29, 2016

Hinshaw & Culbertson LLP Garners More Than Two Dozen Rankings in U.S. News – Best Lawyers' 2016 "Best Law Firms"
November 2, 2015

Twenty-Eight Hinshaw Lawyers Named to 2016 Edition of The Best Lawyers in America
August 17, 2015

Hinshaw & Culbertson LLP Receives Several Tier One Rankings in Multiple Practice Areas by U.S. News - Best Lawyers 2015
November 3, 2014

Twenty-Two Hinshaw Lawyers Chosen as Best Lawyers in America 2015
August 19, 2014

James Lestikow Elected as President of Illinois Bar Foundation
June 23, 2014

Seventeen Hinshaw Lawyers Chosen as Best Lawyers in America 2014
November 1, 2013

Events

Marcia Mueller to Moderate Discussion at Rockford Association of Fundraising Professionals Event
November 14, 2014

Marcia L. Mueller to hold presentation on "Provide and Protect, Important Life and Death Decisions"
August 27, 2014