



PRIVATE CLIENT SERVICES

The Private Client Services Group is a core practice at RCCB and is more expansive than the traditional trusts and estates practice.

We maintain an open and meaningful dialogue with our clients and help them achieve their unique and personal estate planning goals. Although the Private Client Services Group has its primary focus on sophisticated wealth transfer tax planning and trust and estate administration, we are frequently called upon to quarterback the corporate, real estate, tax, and litigation needs of our clients.

Our clients include investors, real estate developers, C-level executives at large public companies, principals at private equity and hedge funds, successful professionals, and entrepreneurs and families that have preserved multi-generational wealth.

In addition to representing wealthy individuals and families, the Private Client Services Group also advises corporate fiduciaries, single and multi-family offices, and investment advisers on wealth transfer tax planning and other matters related to the legal needs of their clients.

In addition to legal advice, the lawyers in our Private Client Services Group participate in and often lead family meetings, make meaningful introductions to develop current and future business opportunities among our clients, coordinate efforts with clients' non-legal advisers, and participate in the decisions that define a family's legacy.

THE BUILDING BLOCKS

The foundation of every estate plan covers the transmittal of property and control in the event of death.

RELATED PRACTICES

Corporate & Business
Employment
International
Nonprofit & Tax-Exempt
Real Estate
Tax

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TEAM

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- Wills
- Living Wills
- Powers of Attorney
- Revocable Trusts

ASSET PROTECTION PLANNING

For many clients, protecting their assets from the claims of others is often paramount.

- Structuring Investments
- LLCs, Limited Partnerships and Corporations
- Asset Protection Trusts
- Prenuptial Agreements

CHARITABLE PLANNING

We assist many of our clients in achieving their philanthropic pursuits.

- Private Foundations
- Charitable Lead Trusts
- Charitable Remainder Trusts
- Donor-Advised Funds

INTERNATIONAL ESTATE & ADMINISTRATION PLANNING

With an increasingly small world, many of our clients have assets abroad.

- Developing global estate plan to be implemented by local counsel
- Structuring ownership of worldwide assets
- Assisting with foreign estate administration
- Serving as local counsel for international families and family offices

TRUST AND ESTATE ADMINISTRATION

We guide our clients through the full life cycle of trust and estate administration.

- Representing executors, trustees, and beneficiaries
- Gift and estate tax return preparation
- Post-mortem tax planning

- Coordinating all aspects of estate administration

WEALTH TRANSFER TAX PLANNING

After the building blocks are complete, many clients turn their focus toward minimizing future wealth transfer tax liabilities.

- Irrevocable Life Insurance Trusts
- Sales to Defective Grantor Trusts
- Grantor Retained Annuity Trusts
- Qualified Personal Residence Trusts
- Spousal Lifetime Access Trusts
- Gift Trusts

NOTEWORTHY

Best Law Firms® - Trusts & Estates Law

NEWS

RCCB Announces New Leadership Election and Lawyer Promotions
RCCB, March 21, 2024

Best Lawyers in America Recognizes Six Practices in New York and Pennsylvania in its "Best Law Firms" Report for 2024
Best Lawyers®, November 2, 2023

Twenty-three RCCB Attorneys Recognized in 2024 Edition of the Best Lawyers in America
Best Lawyers, August 17, 2023

ROYER COOPER COHEN BRAUNFELD (RCCB) ANNOUNCES FOURTEEN 2023 PENNSYLVANIA SUPER LAWYERS® AND RISING STARS®
Super Lawyers, June 5, 2023

U.S. News & World Report - Best Lawyers "Best Law Firms" 2023 Report Recognizes Six Practices
U.S. News & World Report, November 3, 2022

PUBLICATIONS

New Year, New Reporting Requirements: What the Corporate Transparency Act Means for Your Business
RCCB Client Alert, December 20, 2023