Private Wealth Management Abbotsford

Private Wealth Management Abbotsford - Our Wealth Management practice assists clients with wealth preservation, estate planning, business succession, and charitable endeavors. We offer comprehensive expertise, guidance nd knowledge in these areas to philanthropists, executives, entrepreneurs, and high net worth individuals. We work closely with our clients' accountants and financial advisors to deliver quality outcome and service.

Charities and Philanthropy
Essential to personal wealth planning is planned giving. Clients need to know the tax and legal implications of philanthropy. When clients would like to establish techniques of planned giving such as charitable foundations, we advise them about structuring, compliance and administrative issues.

Family Estate & Trust Litigation
We are experienced in acting as counsel throughout arbitrations, mediations, and litigations before all levels of the courts and several administrative tribunals.

Family Business Transition and Succession Planning
Our wealth management services consist of offering recommendation to family-owned and other closely held businesses. We assist such enterprises to reach family goals regarding the restructuring and structuring of their companies in the most tax-efficient way. Our expertise covers inter-generational transitions in addition to transitions to outsiders in different endeavors and industries. These transitions are facilitated through arrangements like for instance shareholders' agreements, corporate reorganizations, the settlement of trusts, and management agreements. Comprehensive solutions frequently need various experts in, for example, real estate or matrimonial law. Our company has these professionals as well as experts in business tax and law.

Individual Estate Planning and Wills
We know that clients who have accumulated significant wealth face complex tax and legal matters along with sensitive inter-personal dilemmas. Our experts know how to maximize tax-efficiency, reduce legal risk, and reduce family distress while implementing and designing plans which are flexible, comprehensive, and consistent with our clients' goals and values. The sale or purchase of a new business, an inheritance, a divorce - these are all major financial events within anybody's life. We provide personalized and helpful guidance in such cases.

Trusts
We advise concerning private trusts as among the most flexible tools available to help clients in their business and personal affairs. We offer ongoing suggestion to the trustees and beneficiaries of private trusts. We are experienced at creating family trusts to facilitate the inter-generational transfer of wealth. There are many other kinds of trusts wherein our practitioners often assist clients, such as trusts for disabled beneficiaries, voting trusts, blind trusts, spendthrift trusts, asset protection trusts, and immigration trusts. For clients interested in philanthropy, we can establish charitable trusts.

In the context of tax planning, private trusts are a useful tool: we assist our clients on tax planning opportunities including probate fee and property transfer tax avoidance, inter-provincial rate shopping, income-splitting, and accessing multiple capital gains exemptions.

Our lawyers are knowledgeable in trust litigation in situations whereby the trust is being utilized offensively as a weapon and defensively. We give counsel and provide our advice for matrimonial planning and dispute resolution situations.

Wealth Preservation
Our practice likewise helps those clients who are under attack from creditors or challenge from future heirs. The objective of our firm is to preserve the wealth of our clients by using methods like establishment of trusts or prenuptial agreements.