



## Trusts & Estates Planning

At Burr & Forman we assist individuals, families, business owners, or other high-net-worth clients to protect, preserve, and pass down what they've worked so hard to build. We also regularly advise corporate trust departments on their fiduciary administrative duties.

We advise clients on the most sophisticated and comprehensive estate and tax planning opportunities available under current law, implementing the most effective planning strategies. We work directly with accountants, life insurance agents, and financial planners to create the best team for our clients.

Our services include:

- Business succession planning
- Charitable gift planning
- Estate & gift tax planning
- Family limited partnerships & limited liability companies
- Fiduciary representation
- Generation-skipping transfer tax planning
- Health care directives (living wills & health care proxies)
- Marital agreements
- Post mortem transfer & income tax planning
- Powers of attorney
- Probate & estate administration
- Wills & trusts

### News

- Julie Anne Oliver Appointed to General Council of the Probate, Estate Planning & Trusts Council of the South Carolina Bar

### PROFESSIONALS

Christian W. Borek

Edward H. Brown

Jennie S. Cerrati

Robert C. Matthews

Scott G. Miller

George E. Morrison

Julie A. Oliver

Jonathan H. Plott

Bruce A. Rawls

Michele Reddick

"Madeleine Maury" Downing Sherman

William "Lee" Thuston

Joseph D. Walker

### RELATED AREAS

International Law & Tax

Real Estate

Succession Planning

Tax Law

Trusts, Estates, & Fiduciary Litigation

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Firm News, 11.21.2022

- Burr & Forman Expands Myrtle Beach Office with Addition of Julie Oliver  
Firm News, 11.03.2022
- Burr & Forman Expands Hilton Head Office with the addition of Bret Pruehs and Jennie Cerrati  
Firm News, 10.13.2021