Private Wealth Management Belleville

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

Charities and Philanthropy
Planned giving is integral to personal wealth planning. Clients must know the laws of philanthropy with the various legal and tax implications. When clients want to establish techniques of planned giving such as charitable foundations, we advise them about compliance, structuring and administrative matters.

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

Family Business Transition and Succession Planning
Our wealth management services include offering suggestion to family-owned and other closely held businesses. We help such enterprises so as to attain family goals regarding the restructuring and structuring of their companies in the most tax-efficient manner. Our knowledge includes inter-generational transitions along with transitions to outsiders in various endeavors and industries. These transitions are facilitated through arrangements like shareholders' agreements, corporate reorganizations, management agreements and the settlement of trust. Comprehensive solutions frequently need other experts in, for example, real estate or matrimonial law. Our firm has these experts as well as professionals in business law and tax.

Individual Estate Planning and Wills
We understand that those individuals and businesses have amassed great wealth would often face tax and legal matters as well as sensitive inter-personal dramas. Our teams of professional lawyers are very effective at reducing family distress, maximizing tax-efficiency and minimizing legal risks while implementing and creating flexible, comprehensive, and consistent plans which match our clients' goals and values. The purchase or sale of a new company, an inheritance, a divorce - these are all major financial events within anybody's life. We provide individualized and helpful guidance in such situations.

Trusts
In order to help clients in their personal and business affairs, we would often advise on private trusts as a flexible tool. For the beneficiaries and trustees of private trusts, we likewise offer ongoing recommendation. We are knowledgeable at creating family trusts to facilitate the inter-generational transfer of wealth. There are many other kinds of trusts with which our practitioners frequently help clients, such as voting trusts, trusts for disabled beneficiaries, spendthrift trusts, blind t rusts, immigration trusts and asset protection trusts. For clients interested in philanthropy, we can establish charitable trusts.

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

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

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