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ESTATE PLANNING

Clark & Trevithick is a full-service business law firm representing clients throughout California for over three decades. Our estate planning team is involved in assisting owners of closely-held businesses and other high net worth individuals in transferring wealth to surviving spouses and descendants by the most efficient and tax-advantaged methods.

We are well-versed in our practice and strive to ensure service, open communication and personal attention to our clients.

Our Estate Planning Services Include:

- Tailoring estate plans to the specific needs of our clients and providing them with innovative estate, gift and generation-skipping transfer tax saving ideas including life insurance and charitable giving
- Preparation of living trusts and other estate planning vehicles
- Counseling family business owners on estate planning and on successful transitioning of business and investment interests between generations
- Administration of trusts and estates following a death
- Representation before the probate court
- Representing clients in transfer tax controversies with the Internal Revenue Service