

Wealth Transfer Planning Opportunities Abound Now

Spring 2020

Although recent events have created uncertainty and stress, the current climate of reduced asset values, very low interest rates, and favorable tax laws presents significant wealth transfer planning opportunities for high net worth individuals and families.

Examples of estate planning techniques that can be particularly effective in this environment include, among others, grantor retained annuity trusts, sales to intentionally defective grantor trusts, spousal lifetime access trusts, and intra-family loans, whether new or refinanced from existing loans.

Wealth transfer planning is of course unique to each family. It is important to review your existing estate plan in light of the opportunities for planning and transfer tax savings afforded by the current environment. Please contact a member of the [Private Wealth Group](#) to discuss how the current planning climate affects you.

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