KRIEG DEVAULT®

Estate Planning and Personal Services

Krieg DeVault estate planning and administration lawyers have earned the confidence of individuals, families, entrepreneurs, business owners, trustees, and professional advisors. Our sophisticated estate and tax planning strategies help clients provide for their beneficiaries, minimize taxes, and preserve financial assets. We customize wills, trust agreements, and succession plans to each client’s specific needs and family circumstances. Our ability to handle complex estate planning, administration and litigation issues reflects the credentials of an experienced team that includes CPAs and former banking executives, four Board Certified Estate Planning and Administration Specialists, and three Fellows of the prestigious American College of Estate & Trust Council. Whether an estate plan involves a simple will or a series of complex trusts, our lawyers work to handle all the details while carrying out client wishes with minimum cost and maximum efficiency.

Services

- Estate Planning
  - Wills
  - Trusts
  - Gift, Estate and Generation Skipping Transfer Tax Planning (including complex trust planning)
  - Lifetime gift programs
  - Qualified Personal Residence Trusts
  - Grantor Retained Annuity Trusts
  - Marital Trusts and Marital Deduction Planning
  - Credit Shelter Trusts
  - Planning with Life Insurance
  - Irrevocable Life Insurance Trusts
  - Life insurance policy sales
  - Living wills
  - Simple wills
  - Pour-over wills
  - Powers of Attorney and Healthcare Representative Nominations
  - Revocable living trusts
- Estate, Trust and Fiduciary Litigation
  - Will & Trust Contests
  - Creditors’ claims
  - Trust disputes
  - Beneficiary and trust litigation
  - Undue influence
  - Mental unsoundness
  - Breach of fiduciary duty
  - Abuses in the use of Powers of attorney

- Fraud
  - Fiduciary Litigation
    - Will Contest
  - Probate, Trust and Fiduciary Appellate Law
  - Tax Litigation (Federal Gift, Estate, and Generation Skipping Tax as well as Indiana Inheritance Tax)
  - Claim Disputes
  - Accounting Disputes
- Business Succession
  - Life insurance policy sales
  - Planning with Life Insurance
  - Business Reorganization
  - Transition planning including Complex Trusts
  - Split-Dollar Life Insurance
  - Life Insurance Trusts and Partnerships
  - Buy-Sell Agreements/Cross-Purchase Agreements
- Estate and Trust Administration
  - Estate administration
  - Probate administration
  - Estate tax return preparation
  - Inheritance tax return preparation
  - Trust administration
  - Fiduciary income tax
  - Creditor protection issues
  - Marital deduction elections and qualified terminable interest property
  - Closely held business exceptions
  - Special use valuation for farmland
  - Installment payment opportunities for the tax on closely-held business interests
  - Corporate Stock Redemption for Payment of estate taxes and expenses
- Personal Services
  - Guardianships
  - Prenuptial Agreements
  - Mental Commitments
- Charitable Planning
  - Charitable Gift Planning
  - Charitable Lead Trusts
  - Charitable Remainder Trusts
  - Charitable Annuities
  - Nonprofit Incorporation
  - Application for Exemption
  - Public Charity Compliance

- Private Foundation Compliance
- Private Foundation Administration
- Evaluation and Due Diligence for Private Foundations
- Charitable Gift Planning and Administration