Reinhart

Arizona/California/Florida/Illinois/South Dakota Law Consultations

Reinhart's Trusts and Estates attorneys are licensed in multiple states, but much of the practice's work outside of Wisconsin focuses on trust matters in Arizona, California, Florida, Illinois and South Dakota. Many of our clients reside at least part of the year in these states or have business interests in these states. As a result, our Trusts and Estates attorneys assist with the multi-jurisdictional planning required for these situations.

Specific planning issues addressed for Arizona, California, Florida, Illinois or South Dakota clients include:

- Using funded revocable living trusts to avoid probate in all states in which the clients own properties.
- Using funded revocable living trusts of equalize spousal shares of the estate to better use both spouses' various tax exemptions.
- Preserving Wisconsin marital property treatment of assets to obtain favorable income tax treatment on those assets after a spouse's death.
- Eliminating Wisconsin marital property treatment, if desired, to avoid complications under local state law.
- Addressing Arizona and California community property treatment of assets where desired.
- Obtaining and retaining favorable Florida homestead creditor protection and property tax treatment of homes.
- Creating and managing "perpetual" trusts using South Dakota's favorable trust laws.
- Optimizing favorable state-law treatment of assets owned in states other than the client's state of legal domicile.

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