

## International Wealth & Asset Planning

### International Wealth and Asset Planning Services

The International Wealth and Asset Planning Practice at Greenspoon Marder guides clients in developing and implementing comprehensive asset protection and wealth management strategies. Our lawyers regularly counsel businesses and individual clients across the United States and around the world in conventional and domestic estate planning matters, integrated estate planning, offshore planning, transactional matters and business and tax planning.

The attorneys at Greenspoon Marder focus on providing clients with the tools and information they need to properly protect and safeguard their assets. Our attorneys have a vast understanding of the complex laws – both U.S. and foreign – governing wealth planning and asset protection and we leverage this knowledge to design strategies that effectively safeguard our clients' assets from the reach of creditors and litigants.

Our firm offers a full range of wealth management and asset planning services, including:

- Asset Protection Planning; Estate Planning
- International Trusts and Estates
- Business Transactions; Business Planning
- Expert Witness Services - Asset Transfers; Trust Matters
- Trust Administration; Trust Services
- Fiduciary Compliance
- Income, Gift and Estate Tax Matters
- U.S. Taxation of Foreign Entities
- Tax Filings and Tax Compliance
- Special Needs Planning; Planning for Persons with Disabilities
- Probate
- Analysis of the Potential and Options for Asset Recovery Actions
- Moving Assets Abroad

### Integrated Estate Planning Approach

Greenspoon Marder's International Wealth and Asset Planning Group is well known for its emphasis on the lifetime protection of the estate ("integrated estate planning"). Integrated estate planning works to ensure that asset protection planning is fully integrated with the client's overall wealth planning and estate planning strategies. This comprehensive approach involves utilizing a mix of asset planning tools and techniques to design an asset protection plan in advance that best deters litigation and guards the client's assets from future risks and threats.

Our lawyers have particular experience working in the field of asset protection through foreign trusts. We have prepared thousand of plans involving foreign trusts and participated in the successful defense of over 100 plans that have been met with a challenge.

To learn more about how our International Wealth and Asset Planning Practice can assist you, we invite you to schedule a consultation with our team.

### News

- Greenspoon Marder Promotes Attorney Eric R. Kaplan to Senior Counsel

- Greenspoon Marder Promotes Three Attorneys to Senior Counsel in 2023
- Greenspoon Marder Partner Carl H. Linder Awarded the Pro Bono Service Award by Dade Legal Aid
- Greenspoon Marder Partner Carl Linder Selected as Featured Speaker for 2022 Offshore Wealth Summit
- Greenspoon Marder Welcomes Partner Ruben N. Gotlieb In Miami
- Greenspoon Marder Partner Carl Linder Featured Speaker at the Latin America ESG Summit
- Greenspoon Marder Partner Edward Brown Featured Speaker on “Leaving a Legacy with Michael Cates” Podcast
- Greenspoon Marder International Wealth & Asset Planning Blog: Amendments to the Tennessee Investment Services Act and Tennessee Uniform Trust Code
- Potential Estate Tax Law Changes and the Completed Gift Trust Solution
- Greenspoon Marder Innovation Summit Webinar Recordings
- Day One Recap: Greenspoon Marder Innovation Summit
- International Wealth and Asset Planning Group Annual Client Letter
- Greenspoon Marder Client Alert: Automatic July 15 Extended Filing Deadlines MAY NOT Apply To All Affected Returns
- Greenspoon Marder Partner Edward Brown Recognized By Lexology Content Marketing Awards As "Legal Influencer For Private Client - U.S."
- International Wealth and Asset Planning Group Annual Client Alert
- Greenspoon Marder Partner, Edward Brown, Co-Authors Irrevocable Trusts Chapter of the Colorado Bar Association's Estate Planning Handbook
- Greenspoon Marder Launches International Wealth & Asset Planning Blog
- Greenspoon Marder Expands International Wealth and Asset Planning Practice With Addition of Shareholder Edward D. Brown in Denver
- Greenspoon Marder Client Alert: 2017 Tax Act
- Greenspoon Marder Supports PurpleStride Denver 2017
- Greenspoon Marder Launches International Wealth and Asset Planning Practice Group

## Videos

- Asset Protection and Comprehensive Estate Planning in Today's Environment
- 2022 Year in Review & 2023 Forecast: International Wealth & Asset Planning
- Immigration, Tax and the Economy: What to Expect in 2022
- Webinar: Why the Cannabis Industry Needs Estate Planning
- Webinar: Potential Estate Tax Law Changes Under a Biden Administration
- Webinar: Trusts & Estates Innovation and Planning Opportunities: What to Do Right Now and What to Do Next!

## Publications

- Incomplete Gift Non-Grantor Trust Issues in California and New York
- 2023 Amendment to Delaware's Qualified Dispositions in Trust Act
- Termination of California's Beneficial Income Tax Loophole Pertaining to Incomplete Gift Non-Grantor Trusts
- Tax Compliance for Integrated Estate Planning Trusts Published in Estate Planning
- Arkansas Becomes The 21st State to Adopt Domestic Asset Protection Trust Laws
- Boo! You're A Billionaire. Scariest Issues You Might Encounter If You Win the Lotto
- Corporate Transparency Act – Beneficial Ownership Information Reporting Requirements
- Feeling lucky? Our Six Tips On What To Do If You Win The Lottery – Part 3
- New Proposed IRS Regulations Show That Not All Gifts Are Safe from Clawback
- States Enacting Workarounds to Address SALT Deduction Limitation

- So You Used Up All of Your Gift and Estate Tax Exemption, Now What?
- Greenspoon Marder International Wealth & Asset Planning Blog: Tenth Circuit Court of Appeals Allows Additional Remedy To Prevent a Judgment Debtor From Hiding Behind a Charging Order
- Greenspoon Marder International Wealth & Asset Planning Blog: Alabama Supreme Court Remands Case Back To Trial Court To Determine Whether A Limited Liability Company Member Should Be Held In Contempt Of Court For Failure to Abide By The Terms Of A Charging Order
- Alabama's Qualified Dispositions in Trust Act
- Whether a Trust Distribution Provision Conditioned Upon a Child's Marriage Status Is Void Against Public Policy as an Impermissible Restraint Against Marriage
- Greenspoon Marder International Wealth & Asset Planning Blog: Significant Estate Tax Changes Proposed – Urgent Action May be Needed to Lock
- Greenspoon Marder International Wealth & Asset Planning Blog: Amendments to the Tennessee Investment Services Act and Tennessee Uniform Trust Code
- IRS Extended Deadline Update
- 2021 Tax Extension – How Does the Extension Affect You?
- Extremely Important Deadline Monday for Tax Filing Requirements for Foreign Trusts
- Greenspoon Marder International Wealth & Asset Planning Blog: Essential Update to Partnership Agreements, Multi-Member Limited Liability Company Operating Agreements and More
- Greenspoon Marder International Wealth & Asset Planning Blog: Opaque No More - United States Abolishes Anonymous Shell Companies With The Corporate Transparency Act
- Greenspoon Marder International Wealth & Asset Planning Blog: Income Tax Benefits of Trusts
- Greenspoon Marder International Wealth & Asset Planning Blog: Feeling Lucky? Our Six Tips On What To Do If You Win the Lottery - Part 2
- Tax Planning Opportunities During the Pandemic
- Potential Estate Tax Law Changes and the Completed Gift Trust Solution
- Day One Recap: Greenspoon Marder Innovation Summit
- Greenspoon Marder International Wealth & Asset Planning Blog: Business Opportunity Trusts and Asset Protection
- International Wealth and Asset Planning Group Annual Client Letter
- Greenspoon Marder International Wealth & Asset Planning Blog: Protection Planning More Relevant Due To COVID-19
- Greenspoon Marder International Wealth & Asset Planning Blog: Previous Loophole in South Dakota's Qualified Dispositions in Trust Act May Result in Ex-Spouse Losing Billions of Dollars
- Greenspoon Marder Client Alert: Automatic July 15 Extended Filing Deadlines MAY NOT Apply To All Affected Returns
- Greenspoon Marder International Wealth & Asset Planning Blog: The Voluntary Capital Gains Tax
- Greenspoon Marder International Wealth & Asset Planning Blog: The Ideal Gift For A Spouse
- Greenspoon Marder International Wealth & Asset Planning Blog: Denver Broncos' Ownership Saga: A Lesson for Estate Planners Part 2
- Greenspoon Marder International Wealth & Asset Planning Blog: The Tax Benefit That Works Because It Is Not A Tax Strategy
- Greenspoon Marder International Wealth & Asset Planning Blog: Are All US Citizens Created Equal In the Eyes of the IRS?
- Greenspoon Marder International Wealth & Asset Planning Blog: Qualified Small Business Opportunities-Patience Has Its Rewards
- Greenspoon Marder International Wealth & Asset Planning Blog: Qualified Opportunity Zone Opportunities--Why Pay Capital Gains Taxes Earlier than Need Be?
- Greenspoon Marder International Wealth & Asset Planning Blog: State Tax Law Update: Supreme Court Limits States' Ability to Tax Trusts Based on Beneficiary Residency
- Greenspoon Marder International Wealth & Asset Planning Blog: Denver Broncos' Ownership Saga: A Lesson for Estate Planners Part 1
- Greenspoon Marder International Wealth & Asset Planning Blog: Tax Court Rules that Offshore Asset Protection Trust Assets are Not Available to the Taxpayer for Purposes of Paying the IRS

- Greenspoon Marder International Wealth & Asset Planning Blog: Benefits of Asset Protection Planning
- Greenspoon Marder International Wealth & Asset Planning: Asset Protection Planning: Dispelling the Myths
- Greenspoon Marder International Wealth & Asset Planning Blog: Asset Protection Without Extravagance
- Greenspoon Marder International Wealth & Asset Planning Blog: The Importance Of Protecting Your Personal Assets And The Assets Of Your Company Too!
- Greenspoon Marder International Wealth & Asset Planning Blog: Feeling Lucky? Our Six Tips On What To Do If You Win the Lottery.
- Think Twice if You Own 100% of a Limited Liability Company
- Value is in the Eyes of the Creditor
- Is Asset Protection Planning Immoral?
- Selfish Reasons to be Generous
- The New Normal In Establishing & Maintaining International Asset Protection Trusts
- I Don't Need Asset Protection, I Have Insurance!
- Asset Protection Planning Should Be High On Your Priority List
- Updates in Trust and Tax Law Cases-Straight Off the Press: Streightoff Estate Treated as Owning Full Partnership Interest in Partnership instead of merely as an Assignee Interest—Bad for Asset Protection?
- Reason to Have Asset Protection Attorneys Preview Tax Filings for International Trusts Before it's Too Late
- Are Most Trusts Really (Potentially) Self-Settled Trusts?
- Be Careful Not to Engage in Fraudulent Non-Transfers
- Assigning QTIP Income Interest: A Valuable GST Planning Tool
- The Misfortunes of Not Addressing One's Fortune
- If an Asset Protection Trust is Used as a Receptacle for Assets, Is this Automatically a Fraudulent Transfer?
- The Offshore Limited Liability Company - Just as Good as a Trust?
- Erosion of Effectiveness of Asset Protection Trusts
- It is Time to Update Entity Agreements
- LLC Charging Order Protection Against Creditor Causes Debtor to Lose Even More Money: How Can That Be?
- New Nevis LLC Law Passes
- European "Blacklist" Status May Hit Home
- Is Jail Time the Nuclear Attack that Creditors have Against Offshore Asset Protection Trusts?
- Georgia Has No Asset Protection on its Mind.
- A Cook Islands Trust that Could Have Succeeded to Protect Assets
- International Wealth Planning Trusts and Current Due Diligence Requirements
- The Demise of Domestic Asset Protection Trusts?
- Greenspoon Marder Client Alert: 2017 Tax Act

## Meet the Team

- Andrew Bechel
- Edward D. Brown
- Ruben N. Gotlieb
- Eric Kaplan
- Carl H. Linder