

## International Wealth & Asset Planning

### International Wealth and Asset Planning Services

The International Wealth and Asset Planning Practice at Greenspoon Marder LLP 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 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 Client Alert: International Wealth and Asset Planning Group
- Greenspoon Marder Associate Jacqueline Fox Recognized Among 2020 Colorado Rising Stars By Super Lawyers
- Greenspoon Marder Presents "Immigration And Tax Considerations For Foreign Companies And High Net Worth Individuals" Seminar
- Greenspoon Marder Partner Edward Brown Recognized By Lexology Content Marketing Awards As "Legal Influencer For Private Client - U.S."
- Greenspoon Marder Attorneys Edward D. Brown And Andrew Bechel To Be Featured Speakers For The "Designing and Drafting the Integrated Estate Planning Structure" Celesq Webinar
- Greenspoon Marder Attorneys Edward D. Brown and Jacqueline Z. Fox Featured Speakers At The Celesq "Recent Developments In Asset Protection Planning During 2018 And Into 2019" Webinar
- International Wealth and Asset Planning Group Annual Client Alert
- Greenspoon Marder Attorney Jacqueline Fox Co-Authors Chapter 8 of the American Bar Association's Asset Protection Strategies Volume 1
- Greenspoon Marder Attorneys Edward Brown and Andrew Bechel To Be Featured Speakers For The "Ethical Considerations for Attorneys Involved in Estate Planning and Asset Protection" Celesq Webinar
- Greenspoon Marder Partner, Edward Brown, Co-Authors Irrevocable Trusts Chapter of the Colorado Bar Association's Estate Planning Handbook
- Greenspoon Marder and The Latin American Lawyer Host Investment and Citizenship Portfolios Forum
- Greenspoon Marder Launches International Wealth & Asset Planning Blog
- Greenspoon Marder Shareholder Edward D. Brown Presenter at Celesq's Ethical Considerations Webinar
- Greenspoon Marder Expands International Wealth and Asset Planning Practice With Addition of Shareholder Edward D. Brown in Denver
- Greenspoon Marder Attorney Allen Rozansky To Co-Chair Continued Legal Education Live Program and Webcast "The Practitioner's Guide To Colorado Business Organizations"
- Greenspoon Marder Attorney Allen Rozansky Co-Managing Editor and Contributing Author to the Colorado Bar Association's "The Practitioner's Guide to Colorado Business Organizations" Third Edition
- Greenspoon Marder Client Alert: 2017 Tax Act
- Greenspoon Marder Supports PurpleStride Denver 2017
- Greenspoon Marder Shareholders Barry Engel, Arthur Ettinger, And Robert Preston Named Among The National Law Journal's 2017 Divorce, Trusts & Estates Trailblazers
- Greenspoon Marder Shareholder Barry Engel To Receive Lifetime Achievement Recognition At SouthPac Conference
- Greenspoon Marder Launches International Wealth and Asset Planning Practice Group

- Greenspoon Marder Shareholder Barry Engel Presents Strafford Webinar on Offshore Asset Protection Trusts

## Videos

- 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

- Whether a Trust Distribution Provision Conditioned Upon a Child's Marriage Status Is Void Against Public Policy as an Impermissible Restraint Against Marriage
- 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 Client Alert: International Wealth and Asset Planning Group
- Greenspoon Marder International Wealth & Asset Planning Blog: Cook Islands Trust Holding Annuities for Benefit of Grantor-Debtor Protected from Creditors
- 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: Connecticut Modernizes its Trust Laws and Becomes 19th State to Allow Self-Directed Legacy Trusts as of January 1, 2020, yet Remains the Only State in the Nation to Impose a State Gift Tax
- 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: How to Alleviate Your Concern about the Decriminalization of Hallucinogenic 'Magic Mushrooms' and Peyote by Providing Goal-Driven Beneficiary Provisions in Your Estate Plan
- 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
- The IRS Has Spoken, Providing Another Asset Protection Trust Strategy
- 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
- IRS Releases Proposed Regulations for Deductions under Section 199A
- NY Bankruptcy Court Holds Inherited IRAs Are Not Protected
- 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
- "Asset Protection Update" By: Edward D. Brown, Esq. and Jacqueline Z. Fox, Esq.
- European "Blacklist" Status May Hit Home
- Is Jail Time the Nuclear Attack that Creditors have Against Offshore Asset Protection Trusts?
- IRS Amnesty Program for Failure to Report Offshore Assets Set to Expire in 2018
- 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**

- Seema Banda
- Andrew Bechel
- Edward D. Brown
- Eric Kaplan
- Carl H. Linder