



Since the firm's early years, Duane Morris has provided estates, trusts, asset planning and related litigation services to individuals, business owners, charitable organizations and fiduciaries. Today, we serve these constituencies with a distinct Duane Morris approach: We listen closely to fully understand our client's business and personal needs and craft legal solutions that bring peace of mind.

In each relationship with our clients, our goal is to minimize tax exposure and preserve capital for the present and future.

### DOMESTIC FOCUS

- ▶ Personal tax planning, including income, estate and gift taxes and charitable giving
- ▶ Estate planning, including will and trust drafting and related services
- ▶ Wealth preservation techniques
- ▶ Charitable endeavors and strategic guidance for charitable organizations
- ▶ Administration of estates with major works of art
- ▶ Tax and estate planning for business owners, particularly those with significant or unique business assets
- ▶ Representation of artists, celebrities and professional athletes in wealth and estate management
- ▶ Advising banks, trust companies and individuals who serve as fiduciaries

### INTERNATIONAL FOCUS

- ▶ Inbound pre-immigration tax panning
- ▶ Expatriation tax planning
- ▶ Foreign trust planning
- ▶ Structuring for the purchase of U.S. real estate
- ▶ Disclosure, compliance and information exchange for international families
- ▶ Planning for assets and families in multiple jurisdictions with an understanding of both civil and common law approaches

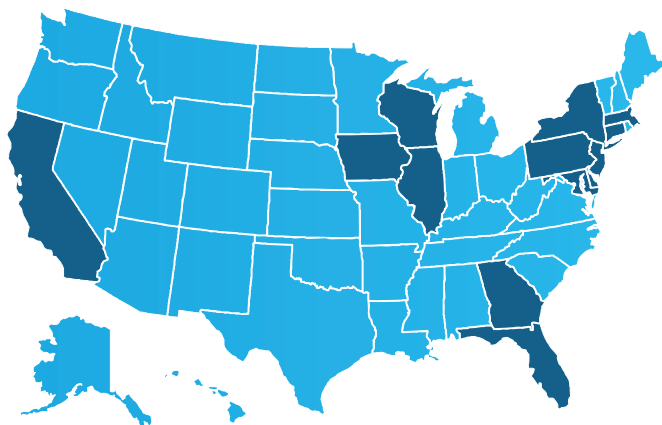


## WHAT SETS US APART

While we are happy to share examples of our work, we think it is more important to tell you what makes us different:

- ▶ Our footprint in the United States allows us to assist your family throughout the country—not only your tax and estate planning needs, but also almost any legal matter that affects families and family businesses.
- ▶ We have attorneys on both coasts to cover both community and separate property jurisdictions.
- ▶ We have deep knowledge of international tax matters to service families from a global perspective.
- ▶ We have partners who focus on fiduciary litigation, which helps our own drafting become stronger and more focused.
- ▶ We highly value a diverse workforce, and our Wealth Planning attorneys reflect that diversity. With varied family backgrounds, religions and languages, our attorneys have the perspective and sensitivity to better meet the challenges our clients face in a diverse world.

## ATTORNEYS ADMITTED IN THESE STATES



Delaware | New Jersey | New York | Pennsylvania | Wisconsin  
 Illinois | Iowa | Maryland | District of Columbia | California  
 Florida | Georgia | Massachusetts | Connecticut



## PRO BONO AT DUANE MORRIS: GIVING BACK TO THE COMMUNITY

Duane Morris' Pro Bono Program provides free legal services to those in our communities least able to afford them. The importance of *pro bono* work and volunteerism have been an integral part of Duane Morris' culture since the firm's inception more than 110 years ago.

## OFFICE LOCATIONS AND REACH



### UNITED STATES

Atlanta  
 Austin  
 Baltimore  
 Boca Raton  
 Boston  
 Cherry Hill  
 Chicago  
 Houston  
 Lake Tahoe  
 Las Vegas  
 Los Angeles

Miami  
 New York  
 Newark  
 Philadelphia  
 Pittsburgh  
 San Diego  
 San Francisco  
 Silicon Valley  
 Washington, D.C.  
 Wilmington

### INTERNATIONAL

Hanoi  
 Ho Chi Minh City  
 London  
 Myanmar  
 Oman  
 Shanghai  
 Singapore  
 Taiwan

- ▶ Joint ventures in Myanmar, Oman, Shanghai and Singapore
- ▶ Alliances in Mexico and Sri Lanka
- ▶ Leadership positions with international networks of independent law firms



## TO LEARN MORE

For more information about the Wealth Planning group at Duane Morris, please contact:

**MICHAEL D. GROHMAN**

1540 Broadway | New York, NY 10036-4086  
 212.692.1040 | MDGrohman@duanemorris.com

This publication is for general information and does not include full legal analysis of the matters presented. It should not be construed or relied upon as legal advice or legal opinion on any specific facts or circumstances. The invitation to contact the attorneys in our firm is not a solicitation to provide professional services and should not be construed as a statement as to any availability to perform legal services in any jurisdiction in which such attorney is not permitted to practice.