



Since the firm's early years, Duane Morris has provided estate, trust, 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.

INTERNATIONAL FOCUS

- ▶ Inbound preimmigration tax planning
- ▶ 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

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



U.S. NEWS-BEST LAWYERS 2023 recognized the firm with **TOP-TIER NATIONAL RANKINGS** in Trusts & Estates Law.

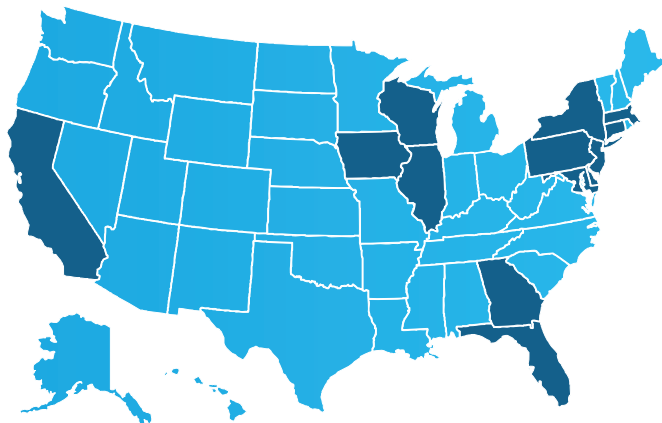


WHAT SETS US APART

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

- ▶ Our broad footprint in the United States allows us to assist your family throughout the country—not only with 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 serve 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 Private Client Services 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 | Los Angeles
Austin | Miami
Baltimore | New York
Boca Raton | Newark
Boston | Philadelphia
Cherry Hill | Pittsburgh
Chicago | San Diego
Dallas | San Francisco
Fort Worth | Silicon Valley
Houston | Washington, D.C.
Lake Tahoe | Wilmington
Las Vegas

INTERNATIONAL

Hanoi | Myanmar
Ho Chi Minh City | Shanghai
London | Singapore

- > Also satellite offices, including Bangor and Portland, Maine; and Seattle, Washington
- > Alliances in Mexico
- > Leadership position with international network of independent law firms

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