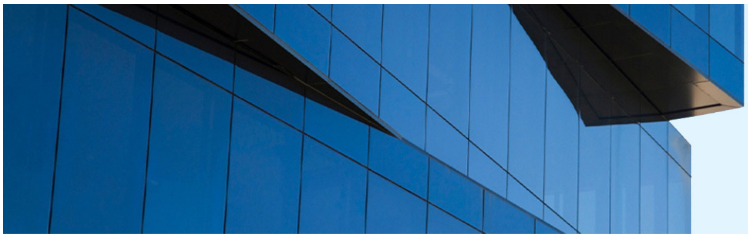

# WEALTH AND SUCCESSION PLANNING

Burke, Warren, MacKay & Serritella is home to one of the most respected Wealth and Succession Planning practices in the Midwest, representing individuals, families and fiduciaries in all phases of estate planning, trust administration, planned charitable giving, succession planning, ownership transition, trust and estate litigation, and risk management.

The Wealth and Succession Planning Practice serves clients ranging from professionals and entrepreneurs in the early stages of wealth creation to those with asset values in excess of a billion dollars. A number of firm clients are included in the annual edition of Forbes magazine's ranking of the 400 richest Americans.

Our attorneys understand that many aspects of our clients' lives, from their business dealings to family relationships, will affect their estate plans and must be carefully considered. We help our clients to both recognize and achieve their individualized goals with trust and estate planning.

**Planned Giving**

With decades of experience advising both individual and family donors and not-for-profit organizations, Burke Warren's attorneys are uniquely qualified to address the legal issues and challenges faced by the philanthropic community. Because many of our attorneys are also donors, board members, and officers for philanthropic organizations, we have a special appreciation for our clients' philanthropic goals. Drawing on this strength, our attorneys help clients structure gifts to benefit both donors and recipients. We advise clients regarding gifts of real estate, conservation easements, artwork and other special assets, bargain sales of appreciated property, charitable lead and remainder trusts, pooled income trusts, and charitable gift annuities.

**Family Offices**

### PROFESSIONALS

Martinique L. Dickey

Anna G. Kardaras

Karen K. MacKay

Mary Kruit McWilliams

Martin P. Ryan

Gregory M. Winters

### AREAS OF CONCENTRATION

Trust and Estate Litigation

### RELATED PRACTICES & INDUSTRIES

Closely Held and Family Businesses

Tax Advisory Services

Tax-Exempt Organizations

Trust and Estate Litigation

Burke Warren represents a number of family offices throughout the United States with regard to various aspects of their operations, including income tax planning, estate and succession planning, structuring private investments, entity formation, asset protection, and litigation.

Our family office clients range from smaller offices with little or no full-time staff to multi-faceted offices with a large number of employees managing billions of dollars in investments. Burke Warren has specialists in many different areas of the law, including trust, corporate, and tax, with decades of experience in representing family offices. This makes Burke Warren uniquely suited to respond to a wide range of issues faced by family offices.

When representing family offices, we work closely with each family office's team of professional service providers, and we tailor our representation to their respective strengths and needs.