NEAL ▪ GERBER ▪ EISENBERG

PRIVATE WEALTH SERVICES

Neal Gerber Eisenberg is a Chicago-based law firm whose lawyers share a culture of teamwork and devotion to personalized client service to advance clients' business interests throughout the U.S. and beyond. Our lawyers provide legal business solutions to public and private entities of all types in connection with domestic and global business transactions and litigation. Our client base reflects a number of Fortune 100 companies, financial institutions, nonprofits and high net worth individuals. The firm has one office in Chicago. Operating from a single office ensures that clients are never lost in the shuffle of a thousand-plus attorneys and multiple global offices. With nearly 175 attorneys, the firm is large enough to handle nearly any legal matter anywhere in the world, yet small enough so clients personally know the attorneys accountable to their matters.

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PRIVATE WEALTH SERVICES

Neal Gerber Eisenberg's private wealth services practice provides high net-worth clients and their families with personalized legal services in connection with all aspects of their personal and professional lives. We are sensitive to the full range of tax, estate planning and corporate issues that impact business value and personal worth.

The group is built around addressing and finding solutions to clients' areas of major concern, such as developing, preserving and maximizing wealth, continuing and properly structuring businesses and transferring control to next-generation family members. The private wealth services group has a significant background in creating value for its clients and serving as trusted advisers.

The firm's private wealth services attorneys are respected by their peers and the community in which we practice. In 2011, U.S. News-Best Lawyers' ranked our practice as among the best in Chicago for trusts and estates law. We also have earned a national reputation for developing successful business plans, including plans of ownership, acquisition, sale and exchange of businesses while working in concert with our clients' business managers, insurance and investment advisers, accountants and others.

The group helps individuals and their families attain testamentary goals through the preparation of wills, trusts and other creative planning devices with the least possible tax cost.

In addition, we help our clients accomplish their charitable goals through the organization of private foundations, public charities and other arrangements.

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WEALTH PLANNING & FAMILY COUNSELING

Our firm offers the legal aptitude to ensure that our clients' estate planning needs are met at all stages of their personal and professional lives. We help meet both long- and short-term testamentary goals through preparing wills and trusts, advance medical directives, powers of attorneys and other documents. These and other sophisticated planning devices allow for a seamless transfer our clients' wealth and businesses to future generations. We also consult on gift planning, asset protection and guardianship and have particular experience in wealth preservation and tax minimization.

TRUST, ESTATE & GIFT TAX PLANNING

The firm has particular experience in administrating trusts and preparing estate tax and fiduciary income tax returns. We counsel our clients and their fiduciaries on funding, distribution and termination issues. Our attorneys develop favorable tax planning techniques for high net-worth families and their businesses. The resources within our estate planning, tax and transactional practices allow us to further client objectives in selecting the form of entities and jurisdiction of formation for transactions. Tax planning is also an important aspect of philanthropy and we are skilled in developing the proper trust or other structures to meet tax objectives.

FAMILY OFFICE COUNSEL

We provide clients with access to a wide variety of services, for themselves as individuals and for the entities which they control. We design and implement sophisticated planning techniques to efficiently protect and transfer our clients' wealth and businesses to future generations. We represent several families who maintain family offices and work closely with their CEOs and managers to enhance their business operations.

PROBATE & ESTATE ADMINISTRATION

We have represented many high-profile estates during our years of practice. We provide counsel during all phases of estate administration and with regard to post-mortem techniques, such as disclaimers. Working closely with the family of the decedent on sensitive legal matters helps to ease the family's burden during the grieving process.

If probate is necessary, we handle court proceedings and filings and provide guidance to the fiduciary during all steps of the administration process. We manage numerous types of assets and assist estate representatives in collecting and distributing the decedent's assets in accordance with the estate plan or as required by law. Our services include funding trusts, obtaining appraisals and asset valuations, and preparing estate tax and fiduciary income tax returns.

FIDUCIARY INCOME TAX

The firm has particular experience in administrating trusts and preparing estate tax and fiduciary income tax returns. We counsel our clients and their fiduciaries on funding, distribution and termination issues. We also assist in preparing and/or reviewing information returns and fiduciary income tax returns.

INTERNATIONAL ESTATE PLANNING

We advise clients on the U.S. tax consequences of assets owned by non-U.S. persons and entities and provide counsel on how those assets may be best sheltered from U.S. income, gift and estate taxes. By combining our knowledge of tax law and our work with tax treaties, we provide our clients with unique talents in dealing with foreign situs property.

PHILANTHROPY & TAX-EXEMPT ORGANIZATIONS

Increasing numbers of individuals, families and businesses are creating their own personal gift vehicles, such as private foundations, donor-advised funds and supporting organizations, to carry out their own philanthropic goals and create an enduring charitable legacy. Donors in today's world want to customize their charitable gifts, measure results and be confident that their charitable intent will be safeguarded. Consequently, charities are required to be more responsive, transparent and accountable than ever before. Giving money away efficiently and effectively is an increasingly complex endeavor.

The firm also has a tradition of helping tax-exempt organizations meet the challenges of adopting "best practices" standards. We have represented numerous private foundations (corporations and charitable trusts), trade associations, supporting organizations and public charities.

We have particular experience in issues relating to qualifying for tax-exempt status (including issues relating to form, structure and situs), joint ventures and other partnering arrangements, Sarbanes-Oxley compliance and the formation of donor advised funds. We also assist clients in grant making and grant agreements, compliance and disclosure requirements, Internet and information technology agreements and on audits, both federal and state.

We offer the full range of consulting services that a donor or charity may need, including:

- Planning
- Formation
- Operations
- Administration
- Fundraising
- Termination

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