



Retirement Planning

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With life expectancies increasing, retirement planning has become an essential and complex part of estate planning. At Stradley Ronon, we work closely with clients to help them achieve and maintain a secure financial future. Collaborating with the firm's investment management and corporate and tax lawyers, the trusts, estates and personal planning team advises high-net-worth individuals, business owners and their family members on all aspects of asset protection; wealth preservation, augmentation and transfer; charitable giving; intergenerational giving; and business succession planning.

Many clients maintain a substantial portion of their wealth in IRAs, 401(k) plans and similar qualified retirement accounts to benefit from the income tax advantages these products offer. However, the complicated rules regarding the transfer of these accounts after the death of the account owner can diminish their value to the beneficiaries. With that in mind, we counsel clients on how best to structure and time investments, business affairs, trusts and estates, and distributions to optimize their value, limit tax liability and avoid penalties. We are knowledgeable about a wide range



of financial products and investment vehicles and adept at advising on how they can be used to help clients achieve their financial goals.

Our experienced team of estate planning attorneys provide practical

advice regarding the most efficient and effective techniques to transfer wealth, manage retirement and other accounts, engage in charitable giving, and use trusts for the benefit of loved ones.

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About Stradley Ronon

For more than 95 years, Stradley Ronon has helped private and public companies – from small businesses to Fortune 500 corporations – achieve their goals. With eight offices and more than 200 attorneys, Stradley Ronon is proud to help companies manage their legal challenges and grow their businesses.

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