



Trusts & Estates Planning

At Burr & Forman we assist individuals, families, business owners, or other high-net-worth clients to protect, preserve, and pass down what they've worked so hard to build. We also regularly advise corporate trust departments on their fiduciary administrative duties.

We advise clients on the most sophisticated and comprehensive estate and tax planning opportunities available under current law, implementing the most effective planning strategies. We work directly with accountants, life insurance agents, and financial planners to create the best team for our clients.

Our services include:

- Business succession planning
- Charitable gift planning
- Estate & gift tax planning
- Family limited partnerships & limited liability companies
- Fiduciary representation
- Generation-skipping transfer tax planning
- Health care directives (living wills & health care proxies)
- Marital agreements
- Post mortem transfer & income tax planning
- Powers of attorney
- Probate & estate administration
- Wills & trusts

News

- Burr & Forman Earns National and Metro Rankings in 2024 Best Law Firms List

PROFESSIONALS

Christian W. Borek

Edward H. Brown

Jennie S. Cerrati

Anastasia E. Jones

Robert C. Matthews

Scott G. Miller

George E. Morrison

Julie A. Oliver

Jonathan H. Plott

Bruce A. Rawls

Michele Reddick

Madeleine Maury Downing Sherman

Ian P. Shippey

William "Lee" Thuston

Joseph D. Walker

RELATED AREAS

International Law & Tax

Real Estate

Succession Planning

Tax Law

Trusts, Estates, & Fiduciary Litigation

Trusts & Estates Planning

Firm News, 11.02.2023

- Burr & Forman Welcomes Attorney Ian P. Shippey
Firm News, 09.13.2023
- Julie Anne Oliver Appointed to General Council of the Probate, Estate Planning & Trusts Council of the South Carolina Bar
Firm News, 11.21.2022
- Burr & Forman Expands Myrtle Beach Office with Addition of Julie Oliver
Firm News, 11.03.2022
- Burr & Forman Expands Hilton Head Office with the addition of Bret Pruehs and Jennie Cerrati
Firm News, 10.13.2021

Events

- Estate Administration
Speaking Engagement, 07.20.2023
- Wills, Trusts, and Estates
Speaking Engagement, 07.20.2023
- South Carolina Estate Administration
06.20.2023