Private Wealth Management Chilliwack

Private Wealth Management Chilliwack - We could assist our clients through our Wealth Management practice in the areas of estate planning, wealth preservation, charitable endeavors and business succession. In these areas, we provide comprehensive knowledge, expertise and guidance to the several executives, entrepreneurs, philanthropists, and high net worth people. We work closely with our clients' accountants and financial advisors to deliver quality service and outcome.

Charities and Philanthropy
Important to personal wealth planning is planned giving. Clients should know the tax and legal implications of philanthropy. When clients like to establish techniques of planned giving like charitable foundations, we advise them concerning administrative, structuring, and compliance problems.

Family Estate & Trust Litigation
In acting as counsel all through mediations, litigations and arbitrations, we are knowledgeable before all levels of the courts and other administrative tribunals.

Family Business Transition and Succession Planning
We offer advice to family-owned and other closely held companies with our wealth management services. We assist family enterprises so as to structure or restructure their businesses in the most tax-efficient method. Our skill covers inter-generational transitions as well as transitions to outsiders in a wide range of industries and endeavors. These transitions are facilitated through arrangements such as corporate reorganizations, shareholder's agreements, management agreements and the settlement of trust. Comprehensive solutions often require other professionals in, like for instance, real estate or matrimonial law. Our company has these experts as well as professionals in business law and tax.

Individual Estate Planning and Wills
We understand that clients who have accumulated significant wealth face difficult tax and legal issues along with sensitive inter-personal dilemmas. Our experts know how to maximize tax-efficiency, minimize legal risk, and decrease family distress while designing and implementing plans which are flexible, comprehensive, and consistent with our clients' goals and values. The sale or purchase of a new company, a divorce, an inheritance - these are all major financial events in anybody's life. We offer helpful and individualized guidance in such cases.

Trusts
We advise on private trusts as among the most flexible tools existing to help clients in their personal and business affairs. We offer ongoing suggestion to the trustees and beneficiaries of private trusts. We are experienced at creating family trusts to facilitate the inter-generational transfer of wealth. There are numerous other types of trusts with which our practitioners frequently help clients, like for example trusts for disabled beneficiaries, voting trusts, blind trusts, spendthrift trusts, immigration trusts and asset protection trusts. For clients interested in philanthropy, we could establish charitable trusts.

Private trusts are a helpful tool in the tax planning context: we advise clients regarding tax planning opportunities like probate fee and property transfer tax avoidance, inter-provincial rate shopping, income-splitting, and accessing multiple capital gains exemptions.

We have litigators who are experienced at trust litigation in cases where the trust may be utilized as both a defense and a weapon. We offer guidance and counsel in situations in which trust expertise is considered necessary in matrimonial planning and dispute resolution.

Wealth Preservation
Our group members assist clients who are under attack from creditors or challenge from future heirs. Our priority is the preservation of individual wealth through techniques such as establishment of trusts or prenuptial agreements.