



# Estate Planning

Lagerlof's clients choose our estate planning team for its ability to build and secure their estate and optimize their financial security.

**Lagerlof**  
LAWYERS LLP





## ABOUT LAGERLOF,LLP

Lagerlof, LLP is the largest law firm in Pasadena. As we continue to grow we know size isn't everything – Lagerlof, LLP has over 100 years of experience and nearly 1,000 years of attorney experience satisfying clients and leading the market in strategic legal support.

With roots dating back to 1908, we have been involved in shaping the legal and business landscape in Southern California for more than 100 years. We stand for innovation tempered with practicality, for thoroughness countered with common sense, and above all else, for impeccable integrity. We strive to be trusted counselors and not just attorneys. Our goal is to establish lasting relationships, and to that end have served many of our clients for decades and some families for as many as four generations.

Even with significant history, we pride ourselves on staying current on the latest legal trends and technology to service our clients.

We look forward to showing you the new Lagerlof - grounded in tradition, focused on the future.

***"By listening to my clients' goals and objectives, I craft estate plans that ensure the successful legacy and wealth transfer now and for generations to come."***

*-Vanessa Terzian, Partner*

# Lagerlof<sup>LLP</sup>

LAWYERS

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**Integrity. Hard Work. Excellence. Team.**



## ESTATE PLANNING

Lagerlof's clients choose our estate planning team for its ability to build and secure their estate and optimize their financial security.

Our attorneys represent businesses, public entities, families, individuals, and trusts and estates. We assist with matters pertaining to estate planning, probate, will and trust preparation, power of attorney, insurance,

retirement benefits, and more. We have deep knowledge of all aspects of estate planning and our team works hard to achieve client goals.

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*This material has been prepared for general informational purposes only and is not intended to be relied upon as professional advice. Please refer to your advisors for specific advice.*

## OUR AREA OF EXPERTISE IS AS FOLLOWS:

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- Estate planning, probate, will and trust preparation and administration
- Asset protection
- Charitable giving, private foundations and trusts
- Estate, gift, generation-skipping and income tax issues
- Executor and trustee responsibilities
- Guardianships/conservatorships and special needs trusts
- Investment vehicles and long-term investment strategies
- Life, disability and health insurance coverage
- Marital agreements and community property rights
- Probate, probate avoidance and estate management
- Retirement benefits, pensions and qualified and nonqualified deferred-compensation arrangements
- Revocable and irrevocable trusts
- Powers of attorney
- Probate and trust litigation
- Tax-efficient wealth transfer strategies, tax elections and disclaimers
- Evaluating estate plans in light of life-changing events such as births, deaths, marriages, divorces and incapacities