Trust and Estate

Overview

Since its founding, Bond has worked with clients to develop and implement customized plans to transfer assets and protect wealth with minimal tax cost.

Bond's attorneys are skilled at working with clients to identify their unique needs and create plans that meet those needs. Our customized plans include designing wills, trusts, beneficiary designations and other documents needed to transfer and protect assets. Bond also works with small business owners to design and implement business succession plans.

We are committed to helping you transfer personal and business assets to families and other beneficiaries in a prudent manner and we meet this commitment by offering our clients thorough estate planning and administration services. These services reflect our experience and sensitivity to the difficult challenges estate planning and administration presents to many families.

Our clients range from individuals of modest wealth to those of significant wealth, from younger clients building a career to older clients who have already amassed their wealth, from clients who are professionals or employees of larger entities to those involved in family businesses. We consider our role to be more one of counselors than of technicians. While we provide you with our experience, skills and technical knowledge to ensure successful results, we do not lose sight of our responsibility to counsel you with respect to the best interests of you and your families. We strive for an ongoing relationship knowing that family needs change and estate plans evolve.

Extending our trust and estate practice areas beyond families, we also counsel fiduciaries, owners of closely held businesses, universities and other charitable and tax-exempt organizations. Our services in these areas include preparation of income tax returns and accountings, preparation of a wide range of business agreements, and the formation and administration of charitable trusts and private foundations. We also assist clients in a wide range of court proceedings in all courts throughout New York and Florida.

Times change, and trust and estate regulations and laws change with the times. What doesn't change is our commitment to serving you, whether as an individual client, business or institution, according to your unique needs, and to provide our attention and skills to ensure optimal results and your satisfaction.

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