Private Wealth Management Moose Jaw Saskatchewan

Private Wealth Management Moose Jaw Saskatchewan - Our Wealth Management practice assists clients with estate planning, wealth preservation, business succession, and charitable endeavors. We offer comprehensive knowledge, expertise and guidance in these areas to entrepreneurs, philanthropists, executives, and high net worth people. We work closely along with our clients' accountants and financial advisors to deliver quality outcome and service.

Charities and Philanthropy
Planned giving is important to personal wealth planning. Clients have to understand the laws of philanthropy with the many tax and legal implications. When clients want to establish techniques of planned giving such as charitable foundations, we advise them regarding compliance, structuring and administrative concerns.

Family Estate & Trust Litigation
We are experienced in acting as counsel throughout litigations, arbitrations and mediations before all levels of the courts and a broad range of administrative tribunals.

Family Business Transition and Succession Planning
We provide recommendation to family-owned and other closely held companies with our wealth management services. We help family enterprises so as to restructure or structure their companies in the most tax-efficient method. Our knowledge includes inter-generational transitions as well as transitions to outsiders in different endeavors and industries. These transitions are facilitated through arrangements such as shareholders' agreements, corporate reorganizations, management agreements and the settlement of trust. Comprehensive solutions regularly require other experts in, like for example, real estate or matrimonial law. Our company has these experts as well as professionals in business tax and law.

Individual Estate Planning and Wills
We understand that those individuals and businesses have amassed great wealth would frequently face legal and tax problems as well as sensitive inter-personal dramas. Our teams of professional lawyers are really effective at minimizing legal risks, reducing family distress and maximizing tax-efficiency while implementing and creating comprehensive, flexible, and consistent plans which match our clients' values and goals. The sale or purchase of a new business, an inheritance, a divorce - these are all major financial events within anybody's life. We offer personalized and helpful guidance in such cases.

Trusts
We advise regarding private trusts as one of the most flexible tools available to be able to help clients in their personal and business affairs. We provide ongoing advice to the trustees and beneficiaries of private trusts. We are knowledgeable at creating family trusts to be able to facilitate the inter-generational transfer of wealth. There are various other kinds of trusts with which our practitioners regularly assist clients, like voting trusts, trusts for disabled beneficiaries, spendthrift trusts, blind t rusts, asset protection trusts, and immigration trusts. For clients interested in philanthropy, we can establish charitable trusts.

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

Our lawyers are knowledgeable in trust litigation in cases whereby the trust is being utilized offensively as a weapon and defensively. We offer counsel and offer our advice for matrimonial planning and dispute resolution situations.

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 strategies like for example prenuptial agreements or establishment of trusts.