

Trusts & Estates

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The McConnell Valdés Trusts and Estates team is committed to helping clients preserve and protect their wealth – both today and tomorrow.

Our attorneys offer astute advice and an array of services designed to not only meet each client's unique estate planning and trust administration needs, but also to minimize future tax burdens. They understand the personal and familial relationships and complicated emotions that motivate clients to create a meaningful legacy for future generations.

Our Trusts & Estates team is knowledgeable about the myriad intricacies and nuances of Puerto Rico estate planning. Puerto Rico is a complicated jurisdiction from an estate and estate planning perspective: since it is a separate taxing jurisdiction from the United States, different tax rules apply to individuals born in Puerto Rico than those born in the United States. As a community property and forced heirship jurisdiction, individuals domiciled in Puerto Rico are limited to how they may distribute their estates.

Working within these limitations, we provide clients with solutions that fulfill their goals for their assets – and plans for the future.

What We Do

We provide comprehensive counsel to high net worth individuals and business owners on:

- Estate planning
- Estate and trust administration
- Business succession planning
- Employee benefits
- Estate & Trusts tax matters