FINCH • THORNTON • BAIRD LLP
ATTORNEYS AT LAW

Wealth Preservation

Business and real estate owners and executives, insurance brokers, and professionals including physicians, CPAs, financial planners, and advisors all rely on Finch, Thornton & Baird, LLP for our experience in wealth preservation strategies. So too do multi-generational families, young couples with children, and individuals. Our skillful attorneys guide clients through all aspects of trusts and estate planning, administration, and probate matters to ensure comprehensive wealth preservation is faithfully executed.

THE EXPERIENCE YOU NEED FOR WHATEVER YOU NEED.

From trusts and estate planning to estate administration and litigation, you want the right resources to handle the situation. In many cases, one of our thoughtful attorneys with strong negotiating skills and well versed in current wealth preservation best practices may be all you need. Other cases, however, sometimes call for the might and muscle that only an experienced legal team with a track record of litigation success in the highest courts can provide.

WITH A PLAN IN PLACE TO PROTECT YOUR WEALTH, YOU'LL SLEEP BETTER.

Our attorneys take scrupulous care to first thoroughly understand each client's specific needs and goals. Only then are we able to carefully devise a strategic plan and prepare the appropriate legal documents. We work to identify and resolve all issues related to taxes – including income, gift, estate, and property taxes – liquidity, business and property succession, and asset protection. Importantly, we endeavor simultaneously to facilitate the transfer of wealth to future generations and minimize post-death disputes. It is a process designed to save you and your heirs money and aggravation down the road.

BRINGING EXPERTISE TO A COMPLICATED AND CHALLENGING EXPERIENCE.

The firm also represents fiduciaries and beneficiaries of trusts and estates. Our attorneys counsel fiduciaries regarding risk mitigation and their duties and responsibilities in the course of a trust or estate administration. We advise beneficiaries of their rights, too. Through this valuable combination of the firm's litigation experience and its knowledge of trusts and estates planning, we are uniquely positioned to resolve, or to litigate, a multitude of trust and estate disputes.

OTHER PRACTICES

- ☐ Labor & Employment
- ☐ Business & Commercial Litigation
- ☐ Business & Commercial Transactions
- ☐ Real Estate
- ☐ Liability Defense
- ■ **Wealth Preservation**

CONSTRUCTION LAW

- ☐ Claims & Disputes
- ☐ Local Agency, Municipal & State Contracts
- ☐ Federal Procurement & Claims
- ☐ Prime Contracts & Subcontracts
- ☐ Labor & Employment
- ☐ Workplace Safety & Health
- ☐ Project Counsel
- ☐ Corporate
- ☐ Real Estate
- ☐ Collections
- ☐ Insurance Defense
- ☐ Wealth Preservation

Finch, Thornton & Baird, LLP
4747 Executive Drive, Suite 700
San Diego, CA 92121

e concierge@ftblaw.com
p 858-737-3100
f 858-737-3101

SERVICES

Trusts and Estates Planning

- Revocable living trusts, wills, and powers of attorney
- Business and succession planning
- Disability planning
- Charitable planning
- Counseling fiduciaries and families in the proper retention of care providers

Trusts and Estates Administration

- Trustee advice and risk mitigation
- Beneficiary advice
- Probate
- Will and trust contests
- Breach of fiduciary duty claims
- Financial elder abuse
- Disputes between co-trustees, and trustees and beneficiaries
- Interpretation of wills and trusts provisions
- Removal of fiduciaries
- Undue influence and lack of capacity claims