Fox Rothschild LLP
ATTORNEYS AT LAW

Let our experience be your guide®

Tax & Estates

Overview

- More than 40 attorneys in 14 offices
- Encompasses 6 specialty practice areas
- Income tax planning of all kinds
- Federal, state, and local litigation

Developing tax and estimated planning objectives and priorities requires attorneys with a highly sophisticated understanding of tax law. We can advise you on how to accomplish your goals and objectives while minimizing the impact of federal, state, and local taxes. We bring the same skill set to estate planning, to provide technical expertise on probate, estate, and trust matters – whether you are an individual of high net worth or a corporate fiduciary seeking how best to administer an estate.

Within the Tax & Estates Practice, we have several specialized practice groups to address your needs:

Employee Benefits & Compensation Planning
Estate Planning & Trusts and Estates
Exempt Organizations
Federal Income Taxation
State & Local Tax Matters
Federal Tax Controversy & Litigation

Services

Income tax planning:

- corporate formations, distributions, mergers, acquisitions, and dispositions
- business entity selection, including consideration of subchapter S versus a C corporation, or an unincorporated entity
- partnership and limited liability company structures
- information on real estate sales and exchanges
- debt restructuring, including cancellation of indebtedness issues
- municipal finance
- international business transactions, reorganizations, mergers and acquisitions, and treaty considerations

Other services:

- tax audits, appeals, and litigation before the U.S. Tax Court and other tribunals having jurisdiction over tax matters, including state and local tax administrative and judicial proceedings
- tax-exempt financing

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"For over a century, we have offered a solid foundation for management and preservation of business and personal worth in the ever-changing world of tax law and regulations."

Jerry August and Steve Levitt
Co-Chairs of the Tax Practice

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- tax aspects of compensation planning, both qualified and nonqualified employee benefits
- qualified pension and profit sharing plans, incentive stock option plans, and employee stock ownership plans
- tax impacts to charitable giving/donations
- tax aspects of charitable organizations and independent/private foundations
- tax litigation matters at the federal, state, and local levels, through appeal
- estate planning
- business succession planning
- Medicaid and elder law
- estate administration
- litigation involving estates and trusts

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Jerry August and Steve Levitt
Co-Chairs of the Tax Practice