Private Client

Attorneys in our Private Client Group understand the unique financial, business and personal legal needs of high net worth individuals and families. We assist clients through difficult family law matters and crucial estate planning for future generations by customizing our legal services to the specific needs of each client. Our Private Client Group attorneys work as a team across multiple practice areas including Corporate, Family Law, Tax, and Trusts, Estate and Probate.

Our Services

Our Private Client Group provides a team-oriented approach with expertise in the following areas:

Trusts, Estates and Probates

United States and multi-national families and individuals turn to the experienced trust and estate planning attorneys in our Private Client Group for counsel on:

- Estate Planning
- Complex Trust and Estate Litigation
- Post Death Estate and Trust Administration
- Business Succession Planning
- Pre-Liquidity Event Planning
- Pre- and Post-Marital Planning
- Wealth Transfer Planning
- Charitable Gift Planning
- Mediation
- International Estate Planning

Family Law

Procopio's Private Client Group includes family law attorneys who represent clients in a broad range of matters involving legal issues that affect every aspect of families in transition, from both a personal and a business perspective. Our attorneys strive to create a close level of trust with each client in order to handle even their most sensitive family law related matters. Procopio's attorneys are skillful in managing a wide variety of family law issues, including the ability to provide a team-oriented approach with expertise in pre- and post-nuptial agreements, separation and marital settlement agreements.

We assist clients through difficult family law matters and crucial estate planning for the future generations by customizing our legal services to the specific needs of each client.

Our family law attorneys also work with our estate planning attorneys to coordinate the drafting of pre-nuptial agreements with estate plans that are mutually consistent, and complement each other in terms of protecting separate property assets, and the creation of community and marital property.

Tax Planning & Controversy

We understand the complex tax issues that arise for high net worth individuals and families. Implementing the proper tax planning is crucial for both preserving wealth for future generations and planning for significant personal and business decisions. Our Private Client Group assists clients with all types of tax planning matters, including charitable giving through tax-exempt organizations, the creation of nonprofit private foundations, and federal and state tax minimization strategies.

We also advise clients on the tax consequences that arise, and protections available, during divorce or families in transition. We represent clients in all aspects of federal, state, and local income and estate tax controversies including Internal Revenue Service (IRS) and Franchise Tax Board (FTB) audits, administrative appeals and litigation in the U.S. Tax Court, Federal District Courts and U.S. Court of Federal Claims.

International Tax and Estate Planning

Our international tax attorneys also advise on cross-border business succession, wealth transfer, and estate planning issues for multi-national families with one or more members with significant assets who reside internationally or who are nationals from outside the United States.