COHEN, TODD, KITE & STANFORD, LLC

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PRIVATE CLIENT SERVICES

Cohen Todd Kite & Stanford, LLC has a long and proud history of serving individual clients' needs. We believe that an individual's legal issues and problems are every bit as important as those of a large commercial enterprise. Our Private Client Services attorneys have a demonstrated commitment to representing individual clients in a wide array of areas including estate planning; probate, estate and trust administration; family law; and personal taxation. In each of these areas, we focus on identifying the client's unique needs and circumstances, and then working with that client to fully meet the client's goals and objectives.

A Multi-Disciplinary Approach

Frequently, individual client matters intersect with other legal areas. For example, estate planning becomes more complex if a family-owned business is involved. Likewise, a family law matter may become complicated if the client or family member is also involved in a criminal proceeding or if there is a need for a guardianship. Cohen Todd Kite & Stanford practices a multi-disciplinary approach in such cases to make sure the client gets the benefit of the best strategy and the most efficient, cost-effective representation. Our attorneys in the Private Client Services Practice Group readily draw on the specialized knowledge of our other Practice Groups, where appropriate, to achieve the best outcomes and desired results for our individual clients.

Private Client Services Practice Group:

James J. Chalfie
John G. Cobey
Matthew M. Kite
Marc W. Rubin
Stanley L. Stanford
Jeffrey S. Vollman
Stanton H. Vollman

ESTATE PLANNING

Few legal matters are more important to individuals than making an estate plan that fully reflects their particular wishes and objectives. Cohen Todd Kite & Stanford counts among its experienced estate planning team, counsel who is a Certified Public Accountant and certified as a Specialist in Estate Planning, Trust and Probate Law by the Ohio State Bar Association Specialty Board. Our team members provide a wide range of services to clients that start with identification of assets, definition of the client's particular goals, and development of a long-term plan that will fully meet the unique needs of the client. We focus on maximizing asset protection, tax-advantaged asset transfer planning through appropriate estate plan measures, and avoidance of probate. Among our services are: preparation of wills, powers of attorney, living wills, trusts (such as personal residence, charitable remainder, charitable lead, and retained interest trusts), gift tax planning, and multigenerational planning. At a time when estate and gift tax laws are subject to frequent change, our experienced team helps estate planning clients navigate legal difficulties and developments that can significantly impact their estate plans and goals.

Because our firm represents many family-owned businesses and the family members who own them, we have particular expertise in developing and implementing estate plans for the succession and transfer of family businesses from one generation to the next. Not only does our guidance help family-owned businesses negotiate the complexities that can arise, but it also promotes important tax advantaged asset transfers that protect business assets. Our attorneys also have significant experience in the negotiation and preparation of prenuptial agreements for business owners, as well as high net worth individuals.

Estate Planning Practice Group:

James J. Chalfie
John G. Cobey
Matthew M. Kite
Terrence A. Mire
Marc W. Rubin
Jeffrey S. Vollman
Stanton H. Vollman

PERSONAL TAXATION

Cohen Todd Kite & Stanford's Personal Taxation practice area provides a full range of representation for tax planning, compliance, audits, and tax litigation and appeals in state and Federal courts. Our team includes a former Certified Public Accountant with international accounting experience, as well as a member with a Master of Laws (LLM) in Taxation from New York University School of Law, the leading tax program in the United States. We provide services for both high net worth individuals with complex tax needs and for clients with more modest assets. Given Cohen Todd Kite & Stanford's strong small and middle-market business practice, our attorneys are also highly experienced in personal tax issues that impact business owners and sole proprietors.

Personal Taxation Practice Group:

Marc W. Rubin
Jeffrey S. Vollman
Stanton H. Vollman

PROBATE, ESTATE & TRUST ADMINISTRATION

Just as important as estate planning is experienced probate, estate, and trust administration. Our team represents beneficiaries, executors, administrators, guardians and trustees. We prepare and file all necessary documents with the local Probate Courts and tax authorities, as well as provide for tax planning, preparation of disclaimers, and the transfer of assets to beneficiaries. Our goal is to effectively and efficiently direct the estate through probate with a minimum of disruption to family members at a difficult time in their lives.

Where probate matters result in litigation, our team includes experienced litigators who appear frequently in Probate Courts, defending and prosecuting actions and claims. Typical cases include the successful recovery of embezzled assets for the decedent's estate; the successful defense of the beneficiary of a large estate in fraud action brought by executors; and the successful defense of a major national charity, an estate beneficiary, against a claim of tortious interference.

Probate, Estate & Trust Administration Practice Group:

James J. Chalfie
John G. Cobey
Matthew M. Kite
Terrence A. Mire
Richard D. Nelson
Marc W. Rubin
Stanley L. Stanford
Jeffrey S. Vollman
Stanton H. Vollman