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Kennedy & Associates

Experienced Estate Planners

In the current political and financial environment, where the nation's top earners have already been targeted for additional taxation, it's more important than ever for the wealthy and the well off to utilize some kind of estate-planning services. And given the complexities involved, they should be turning to seasoned veterans for advice. Veterans like Tom Kennedy and David Jackson of Kennedy & Associates.

Kennedy practices full time in the area of estate planning, and he and Jackson are both board certified in estate planning and probate law by the Texas Board of Legal Specialization, a designation earned by about 1 percent of attorneys in Texas. Kennedy has also taught graduate-level estate planning courses at Rice University and St. Thomas University. He has also been interviewed by Houston area radio and television news programs on financial and estate planning issues.

Kennedy says his firm is unique in that clients will always have an experienced attorney working for them. "There are no novices here. No associates fresh from law school. Just attorneys who are both board certified and experienced," he says. "In other words, if you call on me to do your estate planning, I'll be the one doing your estate planning."

Despite the complexities involved in estate planning, the attorneys pride themselves in their ability to explain the process to their clients in easy-to-understand language. "We're very sensitive to the fact that planning techniques can be complex," Kennedy says. "We may talk in code sections around the office, but we understand that clients want to fully understand what we're doing and we make sure that happens."

"In this economic and political environment, there are many estate

planning opportunities. For example, current low interest rates and depreciated asset values allow for lifetime wealth transfers from one generation to the next upon very favorable terms," says Kennedy.

However, not all clients have estate tax issues. There's more to estate planning than just estate tax planning, so the firm also represents clients whose net worth is below the present 3.5 million dollar estate tax threshold.

All in the Family. Or Not.

Kennedy says in his 30 years of experience he has gained extensive knowledge in the estate planning areas of asset protection and business-succession planning. He was one of the first board-certified attorneys to focus on asset protection and he is a frequent lecturer on that topic. "In today's litigious society, protecting assets from lawsuits is especially important."

Business-succession planning is also important given that only 30 percent of family-owned businesses survive into the second generation and only 15 percent survive into the third. "Business owners have to decide if passing a business to the next generation is the wisest choice," he says. "They have to decide if they want to put their life's work into the hands of a family member who may or may not have the skills or the desire to manage it successfully. To ensure the financial well being of future generations, business owners have to decide if there are family members who can successfully continue the business tradition or if they should consider some other exit strategy."



Leslee Jarisch, Paralegal
 Thomas F. Kennedy and
 David A. Jackson

"There are a lot of tough decisions to be made in every aspect of estate planning," Kennedy continues. "We consider it our duty to guide clients through each and every one of them, step by step."

Estate Planning

- Wills & Trusts
- Simple Estates
- High-Net-Worth Estates
- Estate Tax Law
- Gift Tax Planning
- Charitable Gifts
- Private Foundations
- Life Insurance Trusts
- Living Trusts
- Pre-Nuptial & Post-Nuptial Agreements
- Powers of Attorney
- Family Limited Partnerships
- IRA and Retirement Planning
- IRA Inheritance Trusts

Asset Protection

Business Succession Planning

- Business Organizations
- Buy-Sell Agreements

Probate and Estate Administration

- Intestacy & Heirship Determinations
- Independent Administration
- Dependent Administration
- Trust Administration
- Estate Tax Returns

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