EXCEPTIONAL ESTATE PLANNING EXPERTISE

Kennedy & Associates Offers Accessible Board-Certified Attorneys

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 to be proactive in their estate planning. Given the complexities involved, they should turn to seasoned veterans like Tom Kennedy and David Jackson for advice.

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 taught graduate-level estate planning courses at Rice University and St. Thomas University, and Jackson currently teaches estate and gift taxation at the University of Houston-Downtown. Kennedy has been interviewed by Houston-area radio and television news programs on numerous occasions related to financial and estate planning issues.

"Perhaps the best thing we offer our clients is access," says Kennedy. "When they hire us, they can be sure either David or myself will be working for them every step of the way. We're the ones with the credentials, experience and knowledge. They will not get passed off to junior attorneys, which is the case at a lot of firms."

Through the end of 2012, each person can make tax-free lifetime gifts of up to $5 million. "There are very powerful techniques to leverage this ability to transfer wealth," says Kennedy, "but much of this ability will be lost if the gift tax exemption is not extended."

Asset protection and business-succession planning are often overlooked in estate planning. "In today's litigious society, protecting assets from lawsuits is especially important," says Kennedy.

Leslee Jarisch, paralegal; Thomas F. Kennedy; David A. Jackson; Matthew Bell and Lauren Vasquez, paralegal

"Further, business owners need to carefully consider the future of their business and the consequence of leaving the business in the hands of a spouse or child. An alternate exit strategy may be in order."

Despite the complexities involved, the attorneys pride themselves in their ability to explain the process to their clients. "I want our clients to fully understand what they are doing," says Jackson. "I think we do a very good job of teaching them such that they understand the benefit of various planning techniques."

The federal estate and gift tax does not affect everyone. The firm also represents clients whose net worth is below the current estate tax threshold. According to Jackson, "Everyone's estate is important to us, because it is important to them. We are more than willing to assist clients with any size estate."

"There are many difficult decisions to be made when planning an estate," says Kennedy. "We consider it our duty to guide clients through each of them, step by step."

Estate Planning
- Wills & Trusts
- High-Net-Worth Estates
- Simple 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 & 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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