

ESTATE AND SUCCESSION PLANNING



TRANSFORMATION IS POSSIBLE

We treat the issues related to this process with the care and confidentiality they require. Our lawyers are prepared to deal not only with technical issues, but also with the emotional aspects of the negotiations, contributing to the stability and well-being of the family throughout the planning and transition process.

We are a long-term and trusted partner of our clients for important family and business decisions, serving large business families for years.

We use our expertise in the areas of tax, corporate, litigation, family, and succession law to achieve a unique model that reflects the reality of each family and the property it holds. With our experience and in-depth knowledge of the norms that govern these topics, we develop perennial agreements and contracts with high legal robustness.

Our work includes corporate reorganizations and wealth structuring, income tax, donations, and inheritance involving assets in Brazil and abroad. We draft the most varied of instruments inherent to estate and succession planning, such as wills, donation contracts, creation of family councils, family protocols, pre-nuptial agreements, shareholders' agreements, creation of investment funds and companies, among others. We also advise our clients in the creation and regularization of their relationships (marriages and stable unions) and their property effects (regime of assets and in any ruptures – divorce and dissolution of union), as well as in judicial and extrajudicial inventories.

PHILANTHROPIC INITIATIVES

Estate and inheritance planning of families often goes through philanthropic initiatives that aim to perpetuate a legacy or strengthen a cause. We work in the creation and development of institutes, associations, and foundations for investment in projects related to culture, health, education, social assistance, and preservation of the environment, among other topics.

We advise our clients on the process of setting up non-profit entities, in the development of governance systems for the third sector, in obtaining tax certificates and exemptions, and in the formation of philanthropic equity funds (*endowments*).

Estate and succession planning is the key to preserve the family heritage and ensure the well-being of future generations. Executed based on family values and business profile, it prevents litigation and strengthens family governance.

With a team that is multidisciplinary, sensitive, and experienced in addressing complex cases, we are able to conduct an accurate diagnosis of the needs and objectives of families in order to provide customized solutions and legal certainty, ensuring efficiency and sustainability in planning.

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RANKINGS AND AWARDS



LACCA APPROVED 2022
9 practice areas and
22 ranked lawyers

2021 | LATIN LAWYER 250
22 practice areas and
52 ranked lawyers



2021
7 areas ranked as Top Tier – Brazil
18 recommended areas
65 recognized lawyers



LEADERS LEAGUE

2022
20 practice areas and
53 ranked lawyers

J.P.Morgan

2021
Joan Guggenheimer Law Firm
Diversity Equity and Inclusion
Award's category

Chambers
AND PARTNERS

2022 | AWARDS
Law firm of the year in Public Law category
2022 | GLOBAL
12 ranked lawyers and 32 recognized lawyers
2022 | GLOBAL
12 ranked lawyers and 32 recognized lawyers
2022 | FINTECH
FinTech Legal in Brazil
2021 | BRAZIL
13 practice areas and 30 ranked lawyers
2021 | LATIN AMERICA
19 practice areas and 40 ranked lawyers
2021 | HIGH NET WORTH
Private Wealth Law in Brazil

**CLIENT
CHOICE
Awards
2021**

5 areas recognized for the quality
of work and service offered
to their customers: Energy &
Natural Resources, Securitisation
& Structured Finance, Projects
& Procurement, Public Law and
Corporate Governance

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