



INDUSTRY
**INDIVIDUALS & CLOSELY
HELD BUSINESSES**

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OVERVIEW

Often the legal needs of individuals and small businesses touch the most personal aspects of life. We assist our clients with wealth transfer, including estate planning; corporate formation and succession planning; contract negotiation and drafting; risk management; and, when necessary, litigation. We take pride in providing high quality services in a cost-effective way.

BUSINESS

We advise clients in all aspects of forming and protecting their small businesses. This includes, for example:

- Corporate formation and succession planning, including filings with the Secretary of State's office;
- Services and purchase agreements;
- Employment contracts, including nondisclosure and non-compete agreements; and
- Compliance with employment and workplace rules and regulations.

We assist individuals with wealth management and transfer, including:

- Estate planning;
- Wills and trusts;
- Advance directives, such as power of attorney, health care representative authorizations, and living wills; and



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- Special needs and long term care planning.

INSURANCE COVERAGE

We advise individuals and small businesses with regard to their insurance needs to manage risk, and we help them recover benefits when the time comes. This includes:

- Health, Disability, and Long Term Care Policies to help pay medical costs at all stages of life;
- Property Insurance for home or business;
- Liability Insurance to protect against claims that may arise;
- Directors and Officers Insurance to protect company leadership against allegations of wrongdoing;
- Errors and Omissions Policies to protect entities providing professional services;
- Employment Practices Insurance to protect against employment-related liabilities;

and more.

HEALTH CARE

When medical concerns arise, we help our clients plan and access the care they need and the insurance to help pay for it. In addition, our small business clients benefit from experienced legal counsel to help navigate laws governing their obligations to provide health insurance for their employees and to protect employees' sensitive health information.

LITIGATION

It can be especially stressful emotionally and financially for individuals and small businesses to find themselves embroiled in a lawsuit. In addition, often special consideration must be given to personal relationships that are impacted by the litigation. We work with our clients to reach a successful resolution while still preserving those personal relationships to the greatest extent possible and appropriate.