

**Private Clients**

**Chart A Strong  
Course:**

**An Integrated  
Approach To  
Preserving  
Your Wealth**



**Caplin & Drysdale**

Attorney Advertising

# Tax & Beyond

## **An Integrated Approach to Preserving Your Wealth**

Caplin & Drysdale is a boutique law firm with a nationally-recognized tax practice. We assist wealthy individuals with all of their tax issues, but we also understand that they need advice that goes beyond tax matters.

Our strong, interlocking subpractices enable us to confront the complex issues that inevitably emerge in planning for the preservation of wealth with a truly integrated approach. Based on the needs of each client, we provide a team of experienced lawyers who can serve you on a range of complex issues.

Wealth is a blessing, but it can create a multitude of problems for individuals and families. Some of these issues relate directly to taxes and others go beyond tax questions, such as:

- How to arrange your estate to achieve current and long-term goals
- How best to plan for philanthropic giving
- How to structure personal and business investments
- How to handle income earned from investments or activities in other countries
- How to maximize the benefits of executive compensation
- How to coordinate business and tax strategies for the long term

Caplin & Drysdale attorneys help individuals and their families address these legal issues.

## **Use Our Experience and Perspective to Chart the Right Course**

Lawyers in Caplin & Drysdale's private client group confront a wide range of business transactions every day. We assess and measure the tax effects for clients in their various roles—as owners, investors, consultants and employees. Our tax-sensitive approach underlies all of the legal services that we provide to private clients.

Our private client attorneys have decades of experience advising clients. We have worked both in the government and in private practice, giving us a unique perspective in planning and controversy matters. We know how to listen and we tailor our approach to meet each client's needs. Our first-hand perspective on tax questions helps clients hone their strategies. We keep clients up-to-date on legislative developments and proposed IRS guidance, and guide them through interactions with the IRS.

Whether the client is structuring a transaction, planning a move to a new jurisdiction, doing succession planning, or defending against an IRS challenge, we have the tools to assist.

The logo for Caplin & Drysdale is displayed in a large, white, serif font with a subtle drop shadow effect, set against a light gray background.

## **Estate Planning**

*Steer a course that preserves what you've earned and invested*

Our comprehensive services in estate planning help clients achieve their goals while minimizing estate, gift and generation-skipping transfer taxes.

We prepare wills and trusts, as well as documents to manage clients' affairs with respect to health care decisions and competency issues.

## **International Planning**

*Understand how tax laws apply across borders and oceans*

We provide comprehensive income, gift and estate tax planning services for:

- U.S. clients with international assets or businesses
- U.S. clients who are investing or moving abroad
- Non-U.S. clients with U.S. connections, who are investing in, or moving to, the United States
- U.S. citizens and residents with substantial non-U.S. connections who wish to relinquish their U.S. citizenship or tax residence
- Foreign trusts and other entities with U.S. tax issues

We work closely with foreign counsel to develop sophisticated foreign tax and estate plans.

## **Executive Compensation**

*Know the ropes, here and abroad*

Employers and individuals call on us for advice on the U.S. tax consequences of qualified and non-qualified retirement and other compensation arrangements, including stock options and other equity-based plans. We are proactive in helping clients comply with the ever-changing rules on deferred compensation.

We help international executives and entrepreneurs handle the complex issues of deferred compensation across borders.

## **Philanthropic Planning**

*Plan your giving for maximum impact*

Our exempt organization attorneys can help you structure the most effective framework for charitable giving, including establishing, managing or contributing to:

- A private foundation
- A public charity or supporting organization
- A donor-advised fund
- A charitable remainder or charitable lead trust

# Caplin & Drysdale

## Disputes with the IRS

### *Weather the storm*

Increased IRS scrutiny has given rise to a variety of legal issues for wealthy taxpayers and their businesses. When clients face either a routine civil examination or more aggressive intrusions, our lawyers, with years of experience in tax controversies, can offer meaningful advice.

We assist individuals in all phases and kinds of IRS inquiries. We take a hands-on role, working closely with our clients' other professional advisors. Our lawyers also counsel clients seeking IRS leniency on undetected tax problems, even when the audit has not yet begun.

We have extensive experience counseling individuals who have attracted the attention of Congress, the Department of Justice, the Federal Election Commission and other regulatory authorities.

## Political Activity

### *Navigate the regulatory and legal hazards*

Wealthy individuals often contribute to political campaigns or seek public office. These individuals can benefit from our advice about the federal and state laws that regulate political activity. We help clients navigate the laws that govern contributions to candidates and party committees, which can range from ensuring donors understand any disclosure requirements associated with such contributions to giving advice on any "pay to play" or other business-oriented considerations. We also advise on compliance with the federal and state regulations pertaining to corporate political activity.

We draw on our high level government experience to give you sophisticated advice on tax and other legal issues. With technical skill, insight and personal attention, we can help you meet your planning goals in a tax efficient manner.



## **Our Integrated Approach Can Help You**

- Minimize tax burdens
- Assess U.S. and foreign tax implications
- Create and execute a sophisticated estate plan
- Handle myriad issues related to executive compensation
- Coordinate personal tax planning with business tax planning
- Explore vehicles for philanthropic activity
- Resolve disputes with the IRS
- Obtain guidance or informal advice from the IRS and Treasury Department
- Comply with federal and state laws on political activity

**Contact us to learn more about our integrated approach to preserving wealth.**

One Thomas Circle NW  
Suite 1100  
Washington, DC 20005  
202.862.5000

600 Lexington Avenue  
21st Floor  
New York, NY 10022  
212.379.6000

**Caplin & Drysdale**

[www.caplindrysdale.com](http://www.caplindrysdale.com)