

## Estate Planning That Is Easy to Digest

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## Hoffman &amp; Associates

ATTORNEYS - at - LAW, LLC

Estate planning need not be a complicated, drawn-out affair. But it must be cleverly planned, skillfully drafted and effectively delivered to benefit individuals and families while shielding them from horrendous costs and bitter disputes.

Having established Hoffman & Associates nearly 20 years ago, Managing Partner Michael "Mike" Hoffman understands the needs and desires of those seeking to transfer and protect wealth to future generations' utmost advantage. Considered one of the preeminent estate planning experts in the Southeast, Hoffman enjoys making the complex understandable.

"Minimizing estate taxes, protecting the family farm or business, and addressing mortality issues are difficult," Hoffman says. "We serve predominantly self-made, first-generation wealthy individuals and families, frequently traveling to meet with them, their financial advisors, their CPAs and their other attorneys. We focus on simplifying complex estate planning issues. We're big on diagrams and charts, rather than written summaries. We focus our clients on tax, wealth transfer, asset protection, business succession and family dynamics."



Front Row (from left): Joseph B. Nagel, Michael W. Hoffman, Bridget W. Christian  
Middle Row: Patricia A. Kennedy, Debra B. Duncan, Pamela K. Attridge, Irene D. Meyer  
Back Row: Marc J. Dearth, Emily J. Jarosz, Patrick R. Norris, Bradley D. Palmer

## Masters of Tax and Business Issues

Hoffman & Associates' reputation for excellence in estate planning law is uniquely enhanced by the Firm's emphasis on and experience in tax and business matters. The Firm's tax and business orientation – reflected in its website's timely, informative updates on changing tax laws, for example – makes Hoffman & Associates a rarer gem still.

"Tax issues are second nature to us," Hoffman says. "In fact, we have a separate tax compliance department within the Firm. Most attorneys run screaming from the tax code because of its complexity and frequent changes, but it is our comfort zone."

## The Firm Advisors Trust

CPAs and other professionals throughout the Southeast, many of whom have become clients of the firm, regularly refer clients to Hoffman & Associates. Hoffman, a CPA himself and a longtime, active member and former Board member of the Georgia Society of CPAs, chaired and was instrumental in the formation of the GSCPA's Estate Planning Section (now Estate and Financial Planning Section). Several of Hoffman's partners and associates are also CPAs.

## Experience Breeds Efficiency

The sheer volume of estate planning documents the Firm's attorneys have drafted over the years allows them to quote fixed fees for many services and produce documents expediently.

"We run our Firm like a business," Hoffman says. "We don't keep clients waiting and guessing about costs. When a client makes the decision to do something, we get it done, review it in detail with them, and get it executed while the reasons for doing so are fresh in mind."

Confidant, Teacher,  
Counselor and Advocate

"Estate planning is a very personalized area of law," Partner Bridget Christian explains. "We listen closely, analyze each client's unique situation – often with a client's financial team – so clients can understand alternatives and make informed decisions. We also assist families of clients (and referrals) in navigating the probate process, helping in all matters technical and practical after the death of a loved one."

Hoffman & Associates is adept at tackling estate litigation and tax controversy matters. A recent thorny estate tax matter resulted in approximately \$10 million in savings. For another client, the Firm obtained an abatement of over \$700,000 of assessed penalties in a case referred by another CPA. Says Partner Joe Nagel: "When dealing with the IRS, proper guidance, creative thinking and hard work will produce remarkable results."

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Licensed in Georgia, Florida, Tennessee, North Carolina and Ohio

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