



Laura M. Twomey

Partner

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Head of the Firm's Personal Planning Practice, Laura counsels a large and varied clientele in connection with their personal planning needs. Her clients include high profile groups and individuals, including leaders of the financial industry, Fortune 500 CEOs, media personalities, heads of major international family-owned companies, dynastic real estate families, prominent political figures, directors of private foundations and private companies, multiple generations of iconic American families, and institutions serving as executors and trustees of large estates and trusts. A number of her clients have appeared on such lists as World's Billionaires, *Forbes'* 400 Richest People in America, and *Crain's* Highest-paid CEOs.

Practice Focus:

- Family Office
- Personal Planning
- Corporate

Laura advises individuals and families on the preservation, transfer and management of wealth during life and after death. Her practice includes estate planning, estate and trust administration and charitable planning, planning with private equity and hedge fund interests and family-business succession planning. She is experienced in modifying and terminating existing trusts, as well as migrating trusts for tax and non-tax purposes.

Laura regularly works with clients to create a plan for transferring personal wealth that meets both the client's personal goals and tax objectives, as well as to address a broad range of wealth management issues. She provides highly technical advice in an innately personal way, ensuring seamless coordination with the Firm's other disciplines, while keeping the personal planning process scrupulously separate from other Firm business. Her varied work includes:

- Intergenerational representation of prominent families throughout the decades
- Creating solutions for complex family disputes regarding management and sales of family assets and companies
- Advice regarding structure and timing of pre-IPO transfers and

- transfers of private equity and hedge fund interests
- Structuring family office ownership with an eye toward the personal and often paramount issue of family harmony, while mindful of the technical rules such as the family office exemption from SEC registration and CFTC rules
- Representing public company executives in light of the transfer restrictions, SEC filings, company protocols and public relations concerns that arise when planning with company stock
- Advising on preparation for special family situations, such as providing support for disabled or dependent family members or children of a prior marriage

Laura is named a leading lawyer in wealth management by *Chambers USA: America's Leading Lawyers for Business* and was recognized in the inaugural *Chambers HNW: The World's Leading High Net Worth Advisors 2016*, where she received praise for being “unflappable” and “tireless,” and for her “depth of technical knowledge that allows her to present or propose innovative solutions.” A client added, “she’s really smart, she is very caring about what she does. She is tremendously responsive. She’s fantastic.”

Laura is a frequent lecturer and author on topics relating to estate planning, retirement planning and fiduciary income tax planning. Her estate planning advice has been quoted in the *New York Times*, *The Wall Street Journal*, and other publications.