



**330 YEARS
COMBINED
LEGAL EXPERIENCE**

WHEN WEALTH BECOMES COMPLEX, EXPERIENCE MATTERS.

Sophisticated Estate & Trust Planning for High-Net-Worth Families
Significant wealth requires more than a well-drafted Will or Trust. It requires careful coordination of tax strategies, trusts, business interests, family dynamics, charitable objectives and the people responsible for carrying out your plan. For more than four decades, Pierro, Connor & Strauss, LLC has advised individuals, business owners and multi-generational families on the legal strategies that shape how wealth is preserved, transferred and managed.

A TEAM BUILT FOR COMPLEX PLANNING



LOUIS W. PIERRO, ESQ.
Founding Partner

With more than 40 years of experience, Lou Pierro focuses on estate planning, trusts and estates, elder law, tax planning and business succession. He has been recognized by *The Best Lawyers in America* for Trusts & Estates, Trusts & Estates Litigation, Elder Law and Tax Law, with 20 years of recognition, and has maintained an AV Preeminent® rating from Martindale-Hubbell since 2001. He is a former Chair of the New York State Bar Association's Trusts & Estates and Elder Law Sections.



PETER J. STRAUSS, ESQ.
Senior Counsel

Peter Strauss has practiced in trusts and estates and elder law since 1961. He is a Fellow of the American College of Trust and Estate Counsel (ACTEC), a founding member of the National Academy of Elder Law Attorneys (NAELA), and a former Distinguished Adjunct Professor of Law at New York Law School, where he taught Elder Law and directed the Guardianship Clinic. Mr. Strauss has been selected for 20 years by *The Best Lawyers in America* for Elder Law, Estate Litigation and Trusts and Estates.



ANTHONY K. KHATCHOUI, ESQ.
Counsel

Anthony Khatchoui focuses his practice on high-net-worth planning and the preservation of generational wealth, with particular emphasis on gift, estate and generation-skipping transfer tax planning. He develops sophisticated planning proposals, drafts customized estate plans and uses detailed flowcharts to help clients and their advisors understand how complex strategies work together. He has been recognized by *The Best Lawyers in America* for Trusts & Estates for four consecutive years.

[LEARN MORE ABOUT OUR HIGH NET WORTH PLANNING TEAM HERE](#)

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WHAT SETS US APART

REPRESENTATIVE CLIENT MATTER: \$20M > \$300M

In 2014, the co-founder of a financial software company serving Wall Street engaged Pierro, Connor & Strauss for estate and business planning ahead of significant growth.

Our attorneys created two Delaware Dynasty Trusts, structured as Intentionally Defective Grantor Trusts (IDGT), transferred approximately \$20 million in company shares and implemented complementary trust, business and asset-protection strategies before a future sale and significant appreciation.

The company sold recently for approximately \$300 million, allowing substantial wealth to be fully protected and remain outside the couple's taxable estate for future generations.

Today, the family continues to rely on our firm's commitment to their success for ongoing planning, coordination and legal guidance.

THE GOAL ISN'T SIMPLY TO CREATE A PLAN. IT'S TO ENSURE A LEGACY.

WHAT SOPHISTICATED PLANNING CAN LOOK LIKE

BDITs (Beneficiary Defective Inheritor's Trusts)

Enable business owners and individuals to control trust assets while achieving significant income and estate tax advantages, ideal for leveraging family wealth transfers.

SLATs (Spousal Lifetime Access Trusts)

Transfer assets out of a couple's taxable estate while preserving indirect lifetime access through a spouse and children, balancing tax efficiency with flexibility.

GRATs (Grantor Retained Annuity Trusts)

Shift future appreciation to the next generation with minimal gift tax by retaining a structured annuity stream.

IDGTs (Intentionally Defective Grantor Trusts)

Freeze asset values for estate tax purposes while allowing the grantor to pay income taxes - further reducing the taxable estate.

Beneficiary Controlled Trusts (BCTs)

Provide flexibility and control to heirs while maintaining asset protection and long-term tax efficiency in your bloodline.

Charitable Trusts

Integrate philanthropy with tax planning, creating income streams, deductions, and lasting legacy impact.

THE IMPORTANCE OF MAINTAINING YOUR PLAN

Estate planning for a complex family is not a one-time transaction. Assets change. Businesses grow. Tax laws evolve. Family circumstances shift. New risks emerge. That is why we created the Professional Advisors Lifetime Management System. We focus not only on creating a plan, but also making sure your team keeps legal, financial and estate planning pieces connected over time.

Members have secure 24/7 access to important estate planning documents and critical data through Inheralink®, a centralized digital platform, which is updated at an annual planning review with their attorney, in addition to ongoing access to legal guidance and the ability to coordinate with the financial, insurance and other professional advisors involved in their plan.

