

contests, fiduciary management controversies, accounting matters, guardianship and conservatorship issues and fee debates, we are able to resolve these disputes through negotiation and, when necessary, litigation. The value we add to this process is substantial given the fact that we not only understand the substantive nature of these issues but also possess the strategic and tactical skills necessary to bring such cases to trial. We represent a substantial base of senior executives, entrepreneurs, wealthy individuals and “the family next door.” In addition, the Group counsels many charitable organizations on tax planning.

Brody Wilkinson’s depth in the trusts and estates area extends beyond the capabilities and experience of the ten attorneys who practice within the Group. Our work is facilitated by a team of four paralegals and a fiduciary accountant as well as through the use of a unique and proprietary document management system. In addition, with support from the firm’s Business and Real Estate Groups, we are qualified to address the complex business and real estate issues which often arise with respect to planning. This cross-disciplinary approach enables the firm to coordinate and manage the needs and goals of these clients, both personal and business, in a seamless manner. We also counsel these clients with respect to business succession planning.

Many of our clients divide their time living between Connecticut and Florida. To best serve the needs of these clients, the firm has estate and tax planning attorneys who are admitted to practice in Florida. In addition, Brody Wilkinson maintains a strategic affiliation with the law firm of Jeck, Harris, Raynor + Jones, PA in Juno Beach, Florida. While this relationship facilitates the cooperation between our two firms, both remain independent. The collaboration enables us to assist our clients and preserve valued long-term relationships.

**Asset Protection**  
**Business Succession Planning**  
**Charitable Gift Planning & Family Foundations**  
**Conservatorships & Guardianships**  
**Elder Law**  
**Estate Administration**

**Estate Planning**  
**Family Offices**  
**Taxation & Related Controversies**  
**Tax Planning**  
**Trust Administration**  
**Will, Trust & Fiduciary Litigation**



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Southport Harbor photos by Kit Noble

**BRODY WILKINSON PC** approaches the practice of law differently from most law firms. We strategically limit our practice to key areas where we truly add value based upon our capabilities, sophistication and experience. We partner with other attorneys when additional expertise is required. With utmost confidence, we serve as trusted advisors to our clients offering a single point of contact for practical solutions tailored to their needs and circumstances.

**Trusted Advisors,  
 Practical Solutions**

# About Brody Wilkinson

Based in Southport, Connecticut, with additional offices in New Milford, Connecticut, and New York, New York, Brody Wilkinson is a mid-sized law firm providing sophisticated legal services to a broad base of clients, with an emphasis on individuals and their businesses. Our attorneys bring both unique and complementary experience and skills to the firm, creating a strong platform from which to practice law and serve clients. As such, we operate collaboratively on client matters. Whether we are devising business succession plans, buying or selling properties, crafting estate plans or resolving disputes, we are focused on the ultimate goal of creating value for our clients. We deliver thoughtful, practical, creative and tailored work product in a timely and efficient manner.

## Practice Groups BUSINESS

Brody Wilkinson's Business Group represents a diverse group of clients in a range of services from entity formation to daily business operations to complex commercial transactions. Our clients include privately held businesses, family offices, financial institutions, real estate developers and investors, public companies with specialized needs, health care providers, entrepreneurs and charitable organizations. We assist these clients in areas such as financing, contracts, taxation, lending, workouts and reorganizations, business disputes, commercial real estate investment, employment and employee benefits.

We act as general counsel to many clients and handle all legal needs throughout the lifecycle of the business, including choice of business entity, key contracts with third parties, joint ventures and strategic alliances, corporate governance, mergers and acquisitions, and transactions with lenders and investors, such as venture capital and private equity firms. In addition, the firm serves as local counsel on Connecticut-oriented commercial transactions in such areas as mergers and acquisitions and lending.

The Business Group is particularly adept at serving the special needs of closely held and family businesses. For these clients, we collaborate with our experienced trusts and estates attorneys to create sophisticated legal strategies designed to both obtain and preserve

wealth. We also counsel clients with respect to business succession planning. Entrepreneurs benefit greatly from the strong working relationship between the firm's Business and Trusts & Estates Groups as the start of a business presents unique planning opportunities.

While many of our clients are based in Connecticut and New York (where several of our attorneys are admitted to practice), our geographic reach extends beyond these borders when necessary. Brody Wilkinson is a member of the International Society of Primerus Law Firms. The Primerus affiliation gives us access to excellent legal resources in other jurisdictions ensuring that our clients' needs may be handled efficiently throughout the United States and internationally.

**Art, Antiques & Collectibles**  
**Asset Protection**  
**Commercial Disputes**  
**Creditors' Rights**  
**Emerging Companies & Venture Finance**  
**Employment & Employee Benefits**  
**Energy & Utility**  
**Environmental Remediation & Permitting**

**Family Offices**  
**General Corporate**  
**Loans & Financing**  
**Mergers, Acquisitions & Joint Ventures**  
**Securities**  
**Sports Law**  
**Taxation & Related Controversies**  
**Trademark, Copyright & Internet Law**

## DISPUTE RESOLUTION

Brody Wilkinson's Dispute Resolution Group works as an advocate for businesses and their owners, individuals, non-profit organizations and municipalities in litigation, arbitration and administrative proceedings. Our practice is limited to certain key areas that serve the needs of our individual and business clients. In addition, we often serve as local counsel for out-of-state law firms in Connecticut proceedings.

When a conflict arises, our attorneys assist clients to identify and evaluate their legal needs and business objectives and then work to develop a dispute resolution strategy that achieves the client's goals in the most cost-effective manner. We appear in federal and state courts and before local regulatory bodies and administrative agencies, including municipal land use commissions, the Commission on Human Rights and Opportunities, the Department of Environmental Protection and the Department of Public Utility Control.

The Dispute Resolution Group collaborates with the firm's Business, Real Estate and Trusts & Estates Groups to resolve business, tax, creditors'

rights, environmental, zoning, employment and probate disputes efficiently and successfully.

**Commercial Disputes**  
**Creditors' Rights**  
**Employment & Employee Benefits**  
**Real Estate**

**Taxation & Related Controversies**  
**Will, Trust & Fiduciary Litigation**

## REAL ESTATE

Brody Wilkinson's Real Estate Group represents businesses, developers, investors, homebuyers, architects, engineers, contractors and others in commercial and residential real estate transactions throughout Connecticut. The attorneys in the Group handle all aspects of real estate and environmental matters for commercial, residential and mixed-use properties, including development, acquisitions, financing, sales, leasing, zoning, remediation and dispute resolution.

While we counsel clients on routine contract negotiations, title issues and financing, we also tackle complex matters such as sale-leasebacks, 1031 exchanges and environmental issues which can profoundly impact the outcome of a real estate transaction. The Real Estate Group draws upon the firm's Business Group to meet the demands of certain matters. The capabilities and vast experience of these combined groups enable the firm to add value to a real estate project throughout its entire lifespan.

**Construction**  
**Development**  
**Environmental Remediation & Permitting**  
**Landlord/Tenant**

**Leasing**  
**Purchases & Sales**  
**Tax Appeals**  
**Zoning & Land Use**

## TRUSTS & ESTATES

Brody Wilkinson's Trusts & Estates Group is one of the most sophisticated and extensive practices of its kind in Connecticut. The Group provides diverse and highly personalized services to individual clients and family offices in the areas of estate and tax planning, estate and trust administration, wealth preservation and transmission, charitable giving, business succession planning, conservatorships and guardianships, family foundations and elder law. In addition, when complex probate disputes arise related to will and trust

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