Dykema's Estate & Tax Planning and Administration Practice Group attorneys pride themselves on their responsiveness and willingness to embrace new ideas with outside-the-box thinking. We do not adopt "faddish" planning just because others are doing it. Rather, we are extremely sophisticated in employing the latest techniques to reduce our clients' tax burden while at the same time achieving their goals. We have an "organic" philosophy in that we take advantage of our clients' lifestyles and the facts they present (businesses, portfolios, etc.) and rearrange them so that our clients can continue living their lives without disruptions due to estate and tax planning strategies.

The Huntington Private Bank is focused on one purpose: making life better for our clients, helping their businesses thrive and empowering them to strengthen their communities. Clients look to us for guidance and support throughout their lives and to help them navigate financial decisions, both big and small. We're one of the few private banks that provides clients with their own local team of financial experts who work together to deliver meaningful insights and advice. We provide personalized services ranging from banking and lending services to wealth management, trust administration, legacy planning and insurance. We're also one of the only private banks that automatically welcomes C-suite executives and business owners to join the Huntington Private Bank. And unlike most other private banks, we're focused on serving anyone with the potential for $1 million or more in banking or investment needs. Visit Huntington.com/PrivateBank to learn more.

Northern Trust Wealth Management offers holistic wealth management services for affluent individuals and families, family offices, foundations and endowments, and privately held businesses. It is recognized for its innovative technology, service excellence and depth of expertise and ranks among the top 10 U.S. wealth managers, with $276.7 billion in assets under management as of March 31, 2020. The Northern Trust Company is an Equal Housing Lender. Member FDIC.

Anthony Costanzo, Wealth Strategist, Northern Trust Wealth Management Eastern Michigan

Jim Smallegan is a Wealth Management Advisor who is affiliated with Northwestern Mutual. Jim helps clients with comprehensive financial planning. Over the past 20 years this has included working with and coaching business owners. Recognizing each for their individual stories, thoughtfully thinking through and documenting their dreams, goals and objectives. Working with clients he develops financial plans that guide clients through a customize approach to reaching their goals and objectives. Experience and resources are presented in an exacting blend which can include; Wealth Management, Life insurance planning, disability insurance planning, Long term Care Insurance planning, Retirement Planning- Retirement accumulation strategies, Retirement distribution strategies, Estate planning strategies, Business Succession Planning, Key person planning, and Employee benefits planning. Goals and dreams are the central focus of the decisions and structure for the financial plan that is customized for each client.

Northwestern Mutual is a premier national financial services leader. Northwestern Mutual has been helping families and businesses achieve financial security for 160 years. Through a distinctive, whole-picture planning approach including both insurance and investments, we empower people to be financially confident so they can live life differently. Northwestern Mutual Investment Services is the fifth largest independent broker dealer in the country as of 2019 (investment news).

Varnum is a full-service law firm with four Southeast Michigan offices and a roster of experienced and creative estate planning professionals. We are delighted to welcome David Thoms, who recently joined our existing team of Chris Ballard, Mike Mulcahy, Steve Rohr, Rebecca Wrock, and Tom Bergh. David's addition adds depth and heft to the existing multi-disciplinary estate planning practice. The Southeast Michigan team works in close coordination with the firm's other locations in West Michigan and Florida to provide a rich reservoir of talent and experience.

In addition to traditional estate planning and drafting, the firm's clients and friends have access to creative charitable and tax solutions, as well as resources for preserving closely held business interests and legacy properties such as lakefront cottages, including the efficient transition of interests to new generational owners. The firm has a large and active tax planning and controversy practice, and with several former IRS trial attorneys in its tax litigation group is able to handle contested matters both administratively and in court. The tax team has extensive experience with regard to transfer tax issues, in addition to traditional civil and criminal income tax disputes. We look forward to continuing our collaborative work with other professionals and please feel free to contact any of us at any time.