

Unruh, Turner, Burke & Frees

Attorney David M. Frees, III, a partner of the Chester County law firm of Unruh, Turner, Burke & Frees, believes communicating clearly with clients and helping them clarify their personal and estate-planning goals are the keys to his success in the areas of estate and wealth planning, asset protection, and trust and estate administration. “Clients seek us out because we focus them on what really matters and then give them a clear roadmap to achieve those goals. We also advise them in the use of special trusts and tools that are often overlooked.”

He adds, “There is extensive planning involved to ensure the goals of the clients are attained. There are many subjects to consider, especially when you are planning for the next generation. You have to think about teaching the next generation how to build and keep wealth. You have to be concerned about litigation, taxes and possible divorces in

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the family. We help families who are interested in protecting and passing on their financial wealth and their wisdom.”

David chairs the firm’s estate and wealth preservation department. The process used by Unruh, Turner, Burke & Frees is distinct and usual.

“We obtain a statement by the client of what is important to them and, especially if the children are young, what values the parents want instilled in them. When an heir gains access to an inheritance is important. Too often money is quickly spent or taken in a divorce. Through our customized planning process (Enhanced Estate Planning™), a parent or grandparent can determine when and how much money is available to their heirs, at what age, and for what purposes it can be used. Heirs are also given instruction on building and protecting wealth, the family’s business

and personal values, and on philanthropy and charity donations in accordance with the client’s philosophy,” David says. “We use special trusts to allow purchases while protecting them from divorce, taxation and litigation.”

Cutting-edge technology is also utilized. The firm is experimenting with technology that allows parents and grandparents to leave communications to their children and grandchildren. Those statements are placed on audio and video clips. “This makes our approach to wealth planning, estate planning and asset protection unique,” says Frees.

David Frees is a firm believer in intergenerational family communications. In fact, he wrote the book on the subject, *The Language of Parenting: Building Great Family Relationships At All Ages*. Steve Forbes, Editor-In-Chief of Forbes Magazine. Forbes has called David a “grand master” of family communication.

Planning and training, according to Frees, is the key to attaining the clients’ goals. For those interested in business, there must be a process to perpetuate wealth and family businesses. For those interested in philanthropy, it is important to have charitable purposes built into the plan that interest the next generation as well as the senior generation. “If a family foundation or donor-advised fund is going to survive, the kids must have an interest,” he said. “We work with the Chester County Community Foundation and use them as a teaching tool.”

Unruh, Turner, Burke & Frees was founded in 1990 and now has offices in West Chester, Phoenixville and Malvern. For information on estate planning contact David at 610 933-8069 or by e-mail at dfrees@utbf.com.

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