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MAURICE L. OFFIT

Principal, Timonium Two

PRACTICE AREAS

- Asset Protection Planning
- Estate Administration
- Estates and Trusts

PRACTICE FOCUS

Maurice Offit is a founder of Offit Kurman, a firm which started with only two attorneys in 1987, but today has 19 offices in nine states and the District of Columbia and is ranked on Am Law's 200 list as one of the 200 highest-grossing law firms in the United States. Maurice therefore knows, first-hand, what it's like to grow a successful business and has a keen understanding of the issues that are pertinent to entrepreneurial clients.

Maurice focuses his practice on estate planning, estate and trust administration and asset protection planning and while doing so, helps his clients:

- Grow their businesses
- Protect themselves from potential claims
- Transfer their assets to the beneficiaries of their estate in a tax efficient manner
- Avoid probate
- Achieve their personal and financial goals

Documents that Maurice prepares include the following:

- Powers of Attorney
- Advance Medical Directives
- Wills
- Revocable Living Trusts
- Irrevocable Life Insurance Trusts (ILITs)
- Charitable Remainder Trusts and Charitable Lead Trusts
- Grantor Retained Annuity Trusts (GRATs)
- Spousal Limited Access Trusts (SLATs)
- Qualified Personal Residence Trusts (QPRTs)
- Dynasty Trusts
- Offshore Trusts
- Petitions for Probate
- Inventory and Information Reports
- Administration Accounts
- Federal and State Estate Tax Returns

SPEAKING ENGAGEMENTS

Maurice is invited to speak on a regular basis about estate planning, estate and trust administration and asset protection planning topics. Maurice's speaking engagements include the following:

- The Maryland State Medical Society (MedChi) - "Asset Protection Planning for Physicians"
- National Business Institute Continuing Legal Education "Use of LLCs in Asset Protection Planning and Estate Planning
- Financial Planning Association of Maryland/Annual Conference - "Succession Planning; Buy-Sell Agreements"
- National Football League Players Association - "Estate Planning Challenges for Professional Athletes; Asset Protection Strategies"
- Maryland Association of CPAs/Chesapeake Tax Conference: "Asset Protection Planning - "Like the American Express Credit Card Says, Don't Leave Home Without It"
- Vistage International: "What Every Vistage Member Needs - Food, Shelter, Clothing, and Asset Protection Planning"
- Baltimore Washington Financial Advisors: "Asset Protection: Build A Wall Around Your Assets"

PUBLICATIONS

- "The Truth About Offshore Asset Protection Trusts" - Journal of Financial Service Professionals
- "Going Paperless: An Organizer's Dream; An Estate Administrator's Nightmare" - Geneva Growth International Newsletter
- "The Estate Administration Checklist" - Maryland Association of Certified Public Accountants

EDUCATION

- Georgetown University Law Center, J.D.
- Case Western Reserve University, B.S.
- Certified Public Accountant

ADMISSIONS

- Maryland '75
- District of Columbia '78