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## Beatrice Caplan

Counsel

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Beatrice Caplan is Counsel in the Firm's Personal Planning Practice. She advises clients on complex estate and gift planning matters, focusing on planning with private equity and hedge fund interests, pre-IPO planning for founders, family-business succession planning and structuring of family offices. She has extensive experience in creating tailored solutions to meet the preservation and transfer of wealth goals of her clients, which include leaders of the financial and technology industries, Fortune 500 CEOs, multigenerational real estate families and prominent family-owned companies. She also has experience in modifying and decanting existing trusts to better accomplish her clients' tax and non-tax goals, including

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### PRACTICE FOCUS

Corporate Personal Planning Family Office

to facilitate international tax planning.