PLUNKETT COONEY

DETERMINED. DISTINCTIVE. FEARLESS.™

WILLIAM A. BELUZO, JR.

Partner
38505 Woodward Ave.
Suite 2000
Bloomfield Hills MI 48304

TEL: (248) 901-4037
FAX: (248) 901-4040
wbeluzo@plunkettcooney.com

William A. Beluzo, Jr. focuses his practice in the areas of probate and estate planning, trusts, wills, estate and trust administration, probate and trust litigation, tax law, wealth strategy planning, asset protection planning, and family and elder law.

Prior to joining Plunkett Cooney, Mr. Beluzo worked as an estate and gift tax attorney for the Internal Revenue Service.

He has over 30 years of experience in a wide-ranging personal service law practice, designing and implementing tax and wealth strategies for individuals, estates and trusts. Peers call upon him to serve as an expert witness and to consult in probate and trust litigation. Mr. Beluzo also frequently lectures and provides seminars to CPAs, financial planners and advisors, physicians, elders and community groups.

Mr. Beluzo is also frequently retained by affluent individuals in domestic relations matters. He drafts and designs unique pre- and post-marital agreements and has represented clients with substantial marital estates.

Representative Client Work

- Retained by counsel for taxpayer to handle an IRS estate tax audit seeking over $1,000,000 in taxes, interest and penalty. The matter was resolved with an $800,000 tax savings to the client.
- Represented a taxpayer on appeal from an IRS estate tax audit seeking $750,000 in tax, interest and penalty. The matter was resolved with a refund to taxpayer.

Areas of Practice

- Banking, Bankruptcy & Creditors' Rights Law
- Business Enterprises Law
- Estate Planning
- Family Law
- Financial Services Liability

Honors & Awards

- Certificate of Achievement Thriving in Estate Planning Before & After Tax Reform
- Certification Recipient of Probate and Estate Planning Section – State Bar of Michigan
- Michigan Certificate – Estate Planning – Michigan Insurance Code

Education

- Wayne State University Law School, 1984, L.L.M. Taxation
- Wayne State University Law School, 1970, J.D.
- Wayne State University, 1968, B.A.

Bar & Court Admissions

- Michigan, 1971

- Represented a trustee in a removal petition for a trust with assets in excess of $1,000,000. The case was dismissed with prejudice.
- Represented beneficiaries in an undue influence claim seeking more than $1,000,000. The matter was resolved with the petition being withdrawn.
- Implemented a post-death estate plan strategy to secure tax savings for a spouse and family, resulting in a $500,000 tax savings to the family.
- Implement beneficiary controlled trusts, in which the beneficiary has all the rights, benefits and control over trust property that a person has with outright ownership. However, the trusts provide tax, creditor, predator and divorce protection.
- Implement numerous special needs trusts for disabled and elderly clients to secure an inheritance and prevent the impoverishment of community and/or their surviving spouse.
- Represented numerous individuals prior to and following marriage to secure marital estates.

Professional Affiliations

- Metropolitan Financial and Estate Planning Council of Detroit
- North Oakland County Board of Realtors
- Oakland County Bar Association (Member, Probate and Trust Committee)
- State Bar of Michigan (Probate and Trust Law Section)
- State of Michigan Real Estate Broker
- American Bar Association (Probate and Trust Law Section)
- Wealth Counsel L.L.C.

Community Involvement

- Financial and Estate Planning Council of Oakland County (former director)
- National Network of Estate Planning Attorneys (former member)
- International Association of Financial Planner (former director)

Publications & Lectures

- “Why Every Person Needs an Estate Plan,” Plunkett & Cooney Business Advisor Newsletter, April 2006
- “From the Basic to the Complex: Strategies to Confound Creditors and Conserve Your Wealth,” Ophthalmologist Group Seminar, Farmington Hills, MI, April 2006
- “Why Every Person Needs an Estate Plan,” Plunkett & Cooney Healthcare Industry Newsletter, October 2005

Publications

- Why Every Person Needs an Estate Plan