Trust and Estate Administration

Practices and Industries

PRIMARY CONTACTS

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Our firm's interdisciplinary approach creates efficiencies with respect to administering an estate – we have the relevant experience and resources to provide seamless guidance from estate planning, to estate administration, to planning for future generations based on prior generations' planning.

We assist our clients with probate administration, postmortem tax planning (including effective use of disclaimers, alternate valuation elections, special use valuations, and other tax elections), IRS audits and negotiation, and the negotiation and settlement of intricate estate matters.

We also provide guidance regarding the ongoing administration of irrevocable trusts and other estate planning techniques, including trust reformation and mergers.

Our experienced litigators - working closely with our Private Client Group - handle disputed probate issues, including beneficiary disputes, will contests, will and trust construction and modification, fiduciary (executor, guardian, and trustee) liability, and the establishment and administration of guardianships.

We work closely with a client's accountants to coordinate the preparation and filing of gift, estate, and generation-skipping tax returns, as well as fiduciary income tax returns. We provide guidance regarding income taxation of trusts and estates, and, when necessary, we represent clients before the IRS throughout the audit and settlement of estate, gift, generation-skipping, and fiduciary income tax returns.