

Trust & Estate Administration

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We provide comprehensive representation for executors, trustees, and beneficiaries throughout the estate and trust administration process. Our attorneys offer strategic guidance in navigating the complex legal, financial, and administrative responsibilities associated with administering estates and trusts, ensuring compliance with applicable laws, and resolving disputes when necessary.

Our services include:

- **Probate & Estate Administration**

We guide executors through the probate process, ensuring the timely and efficient administration of estates. This includes filing the will with the court, gathering assets, paying debts, and distributing inheritances in accordance with the decedent's wishes and state law.

- **Trust Administration**

Our team assists trustees in fulfilling fiduciary duties in accordance with trust terms, ensuring proper asset management, tax filings, and distributions to beneficiaries. We help trustees navigate both revocable and irrevocable trusts, ensuring compliance and transparency at every step.

- **Estate & Trust Tax Returns**

Our team works closely with tax professionals to advise on tax matters and assist with finalizing and filing of all necessary tax returns, including estate, gift, and fiduciary income tax filings, to ensure compliance with state and federal tax regulations and to minimize tax liabilities during the estate or trust administration process.

- **Asset Valuation & Distribution**

We assist in valuing assets, such as real estate, business interests, investments, and personal property, to ensure accurate distributions to beneficiaries. We also help determine the most tax-efficient strategies for asset distribution.

- **Creditor Claims & Debt Resolution**

We handle the identification and resolution of creditor claims, working to ensure that debts are settled in an orderly manner and in accordance with the decedent's or grantor's instructions, while minimizing the impact on the estate and its beneficiaries.

- **Disputes & Contested Administration**

In cases of disagreement between beneficiaries, trustees, or executors, we provide mediation, negotiation, and litigation support. Whether dealing with will contests, allegations of breach of fiduciary duty, or challenges to trust validity, our attorneys work to resolve conflicts effectively while protecting our clients' interests.

- **Trust Modifications & Terminations**

We assist trustees and beneficiaries in the modification or termination of trusts when circumstances change, including addressing issues such as changing beneficiaries, altering distribution terms, or terminating a trust due to changed family dynamics or financial situations.

- **Trust and Estate Litigation**

We represent both fiduciaries (executors, administrators, trustees), creditors, and beneficiaries in litigation matters, including will contests, challenges to trust validity, breach of fiduciary duty claims, contested accountings, and disputes over asset distribution. With experience across jurisdictions, we guide clients through litigation with a focus on strategic resolution, efficiency, and protecting long-term interests.