

Trusts, Probate and Estate Planning

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Many clients find estate planning difficult to discuss. We understand this, and we make every attempt to ease the difficulty through compassionate, insightful counsel.

Clients frequently tell us they want to minimize death taxes and probate costs, and ensure that their estate is passed on to designated beneficiaries. We will work with you to plan your estate to your wishes.

Trusts, Probate and Estate Planning - Issues

We can assist you in all of the following trust, probate and estate planning issues:

Revocable living trusts and wills including bypass trusts, credit shelter trusts, tax-saving trusts, family trusts, and marital trusts.

Wills, including tax-saving wills, reciprocal wills, simple wills, will contests, undue influence, testamentary trusts, spousal rights of election, personal representatives, executors and executrixes, probate-related issues and planning for unmarried domestic partners.

Trustee-related issues include duties of trustee, removal of trustee, resignation of trustee, successor trustee, corporations as trustees, and individuals as trustees.

Elder law, conservatorships, guardianships, powers of attorney, powers of appointment and payable upon death accounts (POD).

Irrevocable life insurance trusts, including trustee selection, insurance policies, duties of trustee, generation-skipping transfer trusts and avoidance of death taxes.

Gifting, charitable trusts including charitable remainder trusts and charitable lead trusts.

Private foundations, nonprofit corporations and charitable supporting organizations.