Estate and Trust Administration

The administration of an estate or trust requires careful planning. Many decisions with substantial financial implications, difficult at any time, must be made during a period of mourning. We efficiently handle our clients' needs with compassion, freeing them to focus on their families and personal healing. Additionally, when our clients' loved ones are unable to help themselves, we advise them regarding the guardianship and conservatorship process, including seeking court intervention.

Blending Efficient Administration with Tax Savings

Estate and trust administration can have significant financial consequences for both current and future beneficiaries. To minimize income and estate taxes, preserve assets and maximize estate and trust income for beneficiaries, our estate planning, taxation and transactional attorneys actively collaborate for the best results. By virtue of the high volume of estate and gift tax returns we prepare, we have a high rate of success in efficiently resolving estate and gift tax audits with the IRS.

Education and Understanding

Just as we strive to educate our clients on the decisions they face, we are committed to educating other professionals about estate and trust administration. We have taught courses on estate and gift taxation at UCLA Extension since 1998, frequently lecture at major probate and trust administration institutes, and conduct panel discussions on preparing estate tax returns with IRS examiners and supervisors.

> Our sensitive approach to communication and extensive experience often cause clients to rely on us for personal matters beyond legal issues in their time of grief.

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Preserving Your Legacy

Practicing Attorneys: Estate and Trust Administration

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- Estate and Trust Administration
- Business Succession Planning
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