

## Trust & Estate Planning, Probate

Becker has deep experience in the highly specialized area of Trust & Estate Planning and in all aspects of Probate.

## Trust & Estate Planning

Becker's Trust & Estate Planning attorneys have strong credentials and deep experience in this highly specialized area of the law. The firm serves clients' needs in the following areas:

- Structuring estate, gift, income and generation-skipping plans through wills, trusts, family-limited partnerships, qualified personal residence trusts, grantor-retained annuity trusts, charitable lead and annuity trusts, charitable remainder trusts, and private foundations and gift-giving programs intended to reduce estate taxes.
- Creating disability plans through the use of revocable trusts and powers of attorney for asset management and medical directives for health care management.
- Planning for special circumstances including second or later marriages, same-sex couples, multi-generational wealth transfer, charitable giving and trusts for beneficiaries with special needs.
- Offshore estate planning for U.S. and foreign individuals.
- Advising the owners of closely held businesses, including the preparation of shareholders' and partnership agreements, reorganization, dissolution and transferring ownership to children and other family members.
- Working with personal representatives and successor trustees. regarding all aspects of probate and trust administration.
- Representing beneficiaries of estates and trusts.
- Providing guidance to U.S. taxpayers on the U.S. federal income tax and the non-U.S. tax consequences of doing business or making investments abroad.

## Probate

Our attorneys have experience in all aspects of probate including disputes among beneficiaries, will contests, challenges to personal representatives, challenges to rights of beneficiaries, construction of wills and other testamentary documents, fee disputes, estate tax litigation, fraud and undue influence claims, incompetency claims and all other matters that may arise relating to probate or trust administration.

### **Are you a personal representative or a beneficiary of an estate?**

Whether or not the decedent had a will, the primary way to transfer assets from the name of the deceased to the beneficiaries is to go through the probate process. Probate, the court's oversight of the distribution of the estate's assets, is generally needed to gain access to bank accounts or to re-title real property. This process may seem simple, but it can often touch on sensitive family issues and become difficult to manage. In general, this process should never be attempted without an attorney's assistance.

Becker works with clients as well as with out-of-state heirs and personal representatives to ensure that all aspects of estate administration come to resolution as quickly as possible. We understand the need to handle these matters delicately and promptly, and we offer the proper guidance to our clients throughout this complicated yet necessary process. We are typically called upon to handle:

- Full, Summary and Ancillary proceedings
- Identification and collection of the decedent's assets
- Preparation of Federal Estate Tax Returns
- Trust administration