GRESHAM | SAVAGE
ATTORNEYS AT LAW

Trusts & Estates

Gresham Savage's trust and estate planning services range from the preparation of traditional wills and revocable trusts to more complicated planning such as family limited partnerships, business succession planning, private foundations, retirement planning and planning for clients with highly specialized needs such as multigenerational planning and international assets and family. Other common planning matters include lifetime gift programs, grantor retained annuity trusts, generation-skipping transfer tax planning and life insurance planning. We work with our clients to develop estate planning goals for themselves and their families and then assist our client to achieve their goals using tax sensitive and practical methods.

In our trust and estate administration practice we counsel family members, trustees, beneficiaries and executors on trust and probate administration procedures. In addition to the administration process, tax-related activities for estates regularly include the preparation of estate tax returns, representation in estate tax controversies, and post-mortem planning (including qualified disclaimers). If estate or gift tax returns are audited, our attorneys have the experience to deal directly with federal and state taxing authorities, and, if necessary, to help litigate those issues that are not resolved.

Our team approach to the administration of estates greatly enhances our ability to serve our clients most efficiently and effectively. We also work closely with our clients and their advisors, including trust officers, accountants and financial advisors. We counsel our clients on their fiduciary responsibilities and how to avoid conflict and liability in their actions.

We work closely with our trial lawyers to represent corporate and individual fiduciaries, charitable organizations, individuals and family businesses in trust and probate litigation. We regularly handle will and trust contests, the defense and prosecution of fiduciary surcharge proceedings, will and trust construction, interpretation and reformation proceedings. Our trusts and estates advisors work closely with dispute resolution specialists to achieve optimum results through negotiation, litigation, trial, appeal and alternative dispute resolution methods.

AREAS OF PRACTICE INCLUDE:

- Basic estate planning, including the establishment of living trusts, wills, durable powers of attorney for property management, and durable powers of attorney for health care decisions

- Advanced wealth transfer planning, including life insurance trusts, family limited liability companies, and qualified personal residence trusts

- Charitable gift planning, including charitable remainder trusts

- Business succession planning
- Trust and Estate Administration
- Probate
- Representation of fiduciaries and beneficiaries in disputed matters, including will contests, trust disputes and fiduciary accountings
- Will Contests / Estate-Related Disputes
- Trust-Related Disputes
- Fiduciary Litigation Prevention Counseling