

Trust & Estate Administration

Wooden McLaughlin attorneys provide representation for: (i) personal representatives (executors and administrators) throughout the administration of a decedent's estate; (ii) trustees in connection with their management and administration of trusts; and (iii) beneficiaries of estates and trusts. With regard to trust and estate administration, we consider both our client's fiduciary obligations to fulfill the desires of the trust-grantor or decedent, as well as the intentions of the trust-grantor or decedent.

Our trust and estate administration services include:

- Counseling executors and personal representatives
- Counseling beneficiaries regarding their interests in trusts and estates
- Resolution of intra-family and trustee-beneficiary disputes, including family settlement agreements, family compromise agreements, and representation of trustees and/or beneficiaries
- Analysis of tax matters associated with estate and trust income and distributions
- Assistance with valuation matters for trust and estate assets
- Development of tax-efficient strategies through consideration of available deductions and exemptions, including estate tax marital deductions and special valuation rules
- Structuring and coordinating distributions to beneficiaries
- Preparation of federal estate tax returns

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