WILLS, TRUSTS, & ESTATE ADMINISTRATION

HBS counsels clients on the complete range of planning for and administrating death and disability events. Our cross-discipline team also represents clients on fiduciary, health care, family law and domestic relations, and other services when your circumstances change.

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Overview

The term “trusts and estates” is misleadingly narrow. Our Wills, Trusts, & Estate Administration practice group offers counsel and advice in the full range of planning for and administration of death and disability events. On the planning side, we help individuals craft estate plans that address their unique needs, with wills and trusts being only two of a broad range of tools that may be employed to that end. On the administration side, we represent beneficiaries, heirs, and fiduciaries (including corporate fiduciaries) in all the myriad issues that arise, including asset disposition and distribution, funding, tax issues and elections, joint and partial ownership issues, and disputes among and between beneficiaries and fiduciaries. We have extensive litigation experience, and while resolution outside that arena is always preferable (especially where family relationships are involved), we are prepared to pursue judicial resolution in those cases where it is the best, or only, option.

We firmly believe that legal representation in this arena must be focused on the specific persons involved and the issues that are important to them. We do not sell “canned” estate plans. While taxation issues are always important, we do not believe they should be the driving force in every estate situation. We recognize

Leadership

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Full Team

that the “traditional family” is largely a fiction; every family is unique. The efficient transfer of wealth at death is but one issue, as concerns regarding guardianship of minors and incapacitated adults, delegation of financial and medical decision-making in the event of incapacity, children from other marriages, and the unique needs of physically or mentally challenged family members are merely a few of the other issues that arise. Practice in this area is inseparable from business and real estate issues, and we are able to offer counseling on those matters as a part of our planning and administration services.

Areas

Within this area of the law, we perform a variety of services and address a number of issues including:

- Preparation of Wills, Inter Vivos Trusts, and Powers of Attorney
- Life Insurance planning and administration
- Qualified Retirement Plan issues
- Special Needs Trusts and other Disability Planning
- Business Entity Selection and Administration
- Buy-Sell Agreements and Funding Issues
- Estate Dispute Resolution, in non-judicial and judicial forums
- Selection of Fiduciaries
- Lifetime Transfers and Gifts