

Representative Matters

- Represents high net-worth individuals in solving complex estate and gift tax issues to resolve the issues inherent in the transfer of family wealth and family businesses.
- Represents high net-worth individuals in a myriad of estate and tax planning issues including trust and estate administration, probate, and gift tax areas.
- Represented a successor trustee in a probate matter involving attorneys' fees disputes and distribution issues.
- Successfully defended major corporate trustee in suit by beneficiaries seeking \$100 million in surcharge damages and other relief.