

ESTATES & TRUSTS LITIGATION

Disputes involving estates, trusts and fiduciaries have proliferated over the last few years due to the increase in the number of fragmented families. The stakes are often high, with immense wealth and emotional issues taking center stage. These disputes often involve entanglements with family owned partnerships or corporations.

Our estates and trusts litigation group has substantial experience representing fiduciaries, heirs and other related parties in these disputes. These cases often involve claims that the decedent was incapacitated or subject to undue influence at the time of the will execution. They also involve allegations of improper conduct against fiduciaries in connection with their administration of an estate or trust. Some of these cases have become hard fought court battles, while others have been sensibly resolved through mediation or settlement negotiation in a cost effective manner. In either situation, we understand the issues, develop effective strategies and have a proven track record of achieving desirable results.

REPRESENTATIVE MATTERS

- Represented a beneficiary of a turn-of-the-century testamentary trust that had grown to \$135 million. The last income beneficiary of the trust had died and, pursuant to the terms of the trust, the trust principal was to be distributed to the then-living heirs. The issue being litigated involved whether the decedent intended to include as beneficiaries a family tree line of a predeceased child.
- Represented the family of psychologically impaired former attorney who left his entire estate to his accountant and investment advisor under suspicious circumstances prior to committing suicide.
- Represented four daughters of an elderly couple who unwittingly signed over the deeds to their income-producing apartment complexes to their son, who also served as their accountant and financial advisor. The son claimed his parents wanted him to have the properties and were being manipulated by his sisters after the fact; the daughters alleged that their brother misrepresented the documents and tricked his parents into signing them.