Estates & Trusts

The firm's Estates and Trusts practice group represents individuals and fiduciaries in estate planning, estate, trust and guardianship administration, and Orphans' Court litigation matters. Our attorneys structure customized plans to implement our clients' unique needs, including wealth transfer, tax minimization, business succession planning, asset protection, planning for special needs beneficiaries and elder law.

Estate Planning

- Wills for those in all stages of life, marital status, and wealth accumulation
- Tax planning-federal estate, gift, and generation skipping tax, Pennsylvania inheritance tax, related income taxes
- Planning after the repeal of DOMA provisions
- Planning after the 2017 Tax Cuts & Jobs Act

Incapacity Planning

- Financial powers of attorney
- Health care powers of attorney
- Living wills (advance directives)

Elder Law

- Estate and Trust Planning and Administration
- Retirement Planning
- Financial and Healthcare Powers of Attorney
- Guardianships
- Medicaid (Medical Assistance Long Term Care) Planning
- Long Term Care Insurance
- Advanced Healthcare Directives (Living Wills)
- Asset Protection
- Veterans' Benefits
- Medicare Advocacy
- Disability Planning
- Incapacity Planning
- Mediation/Alternate Dispute Resolution
- Special Needs Planning
- Orphans' Court Litigation
- Nursing and Long Term Care Facility Admission Agreements and Contracts

Trust Planning

- Revocable trusts (living trusts)
- Irrevocable life insurance trusts
- Dynasty or generation skipping trusts
- Minors' and young beneficiary trusts
- Education trusts
- Spousal, asset protection and charitable trusts
- Special/Supplemental Needs Trusts
- Pet Trusts

- Opioid Trusts

Retirement Asset Planning

- Beneficiary designation planning
- Trusts for retirement assets/Stretch IRA planning
- Spousal and non-spousal IRA rollovers
- Options for inherited IRAs

Business Succession Planning

- Multi-generational planning
- Transfer of ownership/management to younger generations
- Buy-sell agreements, funding for succession plans
- Management succession planning
- Planning for sale of business
- Estate and business succession planning required by lenders

Special Needs

- Guardianships
- Handling personal injury awards and settlements
- Special and Supplemental Needs Trusts
- Medicaid (Pennsylvania Medical Assistance)
- Qualifying and maintaining eligibility for public benefits
- Gifting strategies
- Remedying poorly planned bequests

Charitable Planning

- Charitable trusts and annuities
- Charitable gifting strategies
- Maximizing tax benefits of charitable giving
- Formation of private foundations

Estate Administration

- Probate of the will
- Preparation of probate filings (inventory, notices, etc.)
- Preparation of tax returns for income, Pennsylvania inheritance, and federal estate and gift taxes
- Collection, management, and distribution of assets
- Compliance with tax, accounting, and other requirements

Trust Administration

- Duties and responsibilities of the trustee
- Beneficiary rights
- Compliance with tax, accounting, and other requirements
- Preparation and filing of trustee accounts
- Preparation of fiduciary trust income tax returns
- Advising on requirements of fiduciary investment

- Trust terminations
- Regulatory matters for corporate fiduciaries
- Preparation of non-judicial settlement agreements
- Preparation of modification of trust agreements

Orphans' Court Litigation

- Initiating and defending will challenges
- Disputes involving estates and trusts
- Executor and Trustee account filings
- Guardianship proceedings for minors and incapacitated persons
- Cemetery trust triennial account filings