

**PRACTICE-AREAS**

## **Estate Administration**

Administering an estate after the loss of a family member or friend can be overwhelming. That's especially true if you are unfamiliar with the complex legal requirements and procedures involved. Our attorneys and paralegals are here to support you, whether you need specific guidance or want us to manage the process on your behalf. Our highly experienced team includes three CPAs, State Bar certified paralegals and two board-certified attorneys in estate planning and probate law.

### **Our Experience**

- **Probate**, including preparation of documents required to open and close testate and intestate estates
- **Counseling** executors and trustees with estate, trust and fiduciary issues
- **Estate inventories** and collection of assets
- **Trust** funding and administration
- **Distribution of assets** to beneficiaries
- **Estate tax strategies** and the filing of fiduciary income tax returns
- **Preparation and filing** of estate (Form 706), gift (Form 709) and generation skipping transfer (Form 709) tax returns
- **Management of inherited assets** to minimize tax exposure
- **Litigation** involving the validity, interpretation and administration of wills and trusts

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## **Related Practices**

**Business**

**Tax**

**Wills, Trusts & Estate Planning**

## **Related News**

**NEWS**

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August 17, 2023

**NEWS**

**Carruthers & Roth Expands Estates and Business Planning Practice Groups**

November 10, 2021

## **Related Resources**

**RESOURCES**

**The Tortured Estates Department: 13 Estate Planning Insights Inspired by Song Titles from Taylor Swift's Album "The Tortured**

## **Poets Department.”**

July 17, 2024

### **RESOURCES**

## **Stories From Almost 50 Years of Practice in Estate Planning and Estate Administration**

December 06, 2023

### **RESOURCES**

## **Be Careful in How You Transfer Property to Minors**

November 13, 2015

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