Trusts and Estates Law

At Flaster Greenberg, we understand that effective estate planning is about more than documents. It is about protecting your hard work, providing for the people you care about, and creating a lasting legacy. Our Trusts & Estates attorneys counsel individuals and families throughout New Jersey, Pennsylvania, and Florida, delivering sophisticated, tax-efficient strategies tailored to each clients goals and circumstances.

With a strong presence in New Jersey, including Cherry Hill and the greater South Jersey region, as well as the Philadelphia metropolitan area and the Pennsylvania suburbs, our attorneys bring deep regional knowledge of state-specific estate, inheritance, and tax laws. We also advise clients with interests in Florida, particularly those navigating multi-state residency, retirement relocation, and domicile planning.

We take a comprehensive, big-picture approachbalancing personal priorities with advanced financial planningto help minimize exposure to federal and state estate, gift, generation-skipping, and inheritance taxes.

Estate Planning

We design customized estate plans for individuals, families, and business owners across New Jersey and Pennsylvania, with additional guidance for clients establishing or maintaining residency in Florida.

Our estate planning services include:

- Drafting wills, trusts, and powers of attorney in compliance with New Jersey, Pennsylvania and Florida law
- Structuring revocable and irrevocable trusts for tax efficiency and asset protection
- Lifetime gifting strategies and charitable planning
- Business succession planning for closely held companies in the Philadelphia, South Jersey, and South Florida markets
- Coordination of retirement accounts, IRAs, and life insurance beneficiary designations
- Planning for non-traditional families, high-net-worth individuals, and multi-state or international assets

Attorneys

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We regularly advise clients on advanced estate planning techniques including SLATs, GRATs, QPRTs, and ILITswhile ensuring alignment with both federal tax law and state-specific considerations.

Trust and Estate Administration

We guide executors, trustees, and beneficiaries through the administration of estates and trusts across multiple states helping them navigate complex legal, tax, and procedural requirements.

Our services include:

- Probate and estate administration in New Jersey Surrogates Courts, Pennsylvania Register of Wills/Orphans Courts and Floridas Circuit Courts
- Administration of non-probate assets and trusts
- Asset collection, valuation, and distribution
- Creditor claims and debt resolution
- Preparation of Federal Estate and Gift Tax Returns, New Jersey Inheritance Tax returns, Pennsylvania Inheritance Tax returns, and estate and fiduciary income tax filings, as well as planning considerations for clients in Florida, which does not impose a state estate or inheritance tax
- Post-mortem tax planning, including disclaimers and strategic elections

Our attorneys prioritize efficient administration and frequently utilize nonjudicial settlement agreements and other strategies to help families throughout the South Jersey, Philadelphia, and Florida regions to avoid unnecessary court involvement and minimize disputes.

Tax Planning and Controversy

Tax planning is central to preserving wealth. We advise clients throughout New Jersey, Pennsylvania, and Florida on strategies to reduce estate, inheritance, and income tax exposure while maintaining flexibility in their plans.

We also represent clients in audits and tax disputes before the Internal Revenue Service, the New Jersey Division of Taxation, and the Pennsylvania Department of Revenue, and advise clients with Florida tax considerations. Our experience allows us to resolve controversies efficiently and, when necessary, pursue litigation to protect our clients interests.

Business Succession Planning

For business owners in New Jersey, the Greater Philadelphia area, and Florida estate planning often includes preparing for the successful transition of ownership.

We work with closely held and family-owned businesses to develop succession plans that:

- Preserve enterprise value

- Address family and stakeholder dynamics
- Minimize tax exposure
- Ensure continuity across generations

Our attorneys regularly structure buy-sell agreements, shareholder agreements, and other transfer mechanisms designed to meet both personal and business objectives.

Asset Protection

In addition to tax planning, we help clients safeguard assets from potential risks, including creditor claims, business liabilities, and unforeseen personal exposure.

We advise individuals and business owners across New Jersey, Pennsylvania, and Florida on asset protection strategies involving trusts, limited liability companies, and other structures designed to preserve wealth while maintaining control and flexibility.

Charitable Planning

Charitable giving can be a meaningful way to support important causes while also achieving significant tax and estate planning benefits. Our attorneys advise clients on a range of charitable planning strategies, including the use of charitable trusts and private foundations, to align philanthropic goals with overall wealth preservation.

We assist in structuring charitable remainder trusts (CRTs), charitable lead trusts (CLTs), and other planned giving vehicles that can provide income streams, reduce estate and gift taxes, and create lasting charitable impact. We also counsel clients on the formation and administration of private foundations, ensuring compliance with applicable regulations while maximizing flexibility and control over charitable activities. By integrating charitable planning into a broader estate plan, we help clients create a legacy that reflects both their financial objectives and personal values.

Related Trusts & Estates Services

Trusts & Estates Litigation

When disputes arise, our attorneys represent clients in trust and estate litigation throughout New Jersey, Pennsylvania, and Florida including:

- Will contests and fiduciary disputes
- Challenges involving trusts, powers of attorney, and inter vivos transfers
- Guardianship litigation

While we aim to resolve matters through negotiation or alternative dispute resolution, we are experienced litigators prepared to advocate in court when necessary.

Guardianship and Conservatorship

We assist families in New Jersey and Pennsylvania with guardianship and conservatorship matters involving minors, elderly individuals, and those with special needs or incapacity.

Our attorneys handle:

- Establishment of guardianships and conservatorships
- Court proceedings in New Jersey Superior Court and Pennsylvania Orphans Court
- Ongoing fiduciary guidance
- Modification or termination of existing arrangements

We approach these matters with sensitivity, helping families navigate difficult decisions with clarity and confidence.

Residency (Domicile) Planning

For individuals with homes in multiple states, particularly New Jersey, Pennsylvania, and Florida, residency (domicile) planning is a key component of minimizing tax exposure and ensuring a cohesive estate plan. Our attorneys work closely with our Trusts & Estates team to align residency decisions with broader wealth preservation strategies. **Our services include:**

- Florida residency and homestead planning to maximize Floridas tax and asset protection benefits
- Domicile analysis and strategic planning for clients transitioning from New Jersey or Pennsylvania to Florida based on knowledge of the pressure points and audit techniques
- Guidance on establishing and documenting domicile for tax purposes
- Strategies to minimize New Jersey and Pennsylvania income tax when major income events are on the horizon
- Strategies to minimize New Jersey inheritance tax and Pennsylvania inheritance tax through residency planning
- Audit defense and representation in domicile disputes with state taxing authorities
- Coordination of residency changes with estate planning documents, trusts, and asset titling
- Advising on multi-state estate administration and tax implications

A Long-Term Partnership

Estate planning is an ongoing process that evolves with your life, your family, and the law. At Flaster Greenberg, we serve as long-term advisors to clients throughout New Jersey, Pennsylvania, and Florida, providing continuity, insight, and trusted guidance at every stage.

Whether you are creating your first estate plan, administering a loved ones estate, or planning for multi-state living, our Trusts & Estates team is here to help you move forward with confidence.