Administration of Estates and Trusts

Our attorneys advise executors and trustees on the proper and most tax-efficient means of administering probate and non-probate estates and trusts. Our administration services include post-mortem tax planning strategies, preparation of federal and state fiduciary income and estate tax returns, preparation, defenses, and challenges to estate and trust accountings, and the distribution and termination of estates and trusts.

Fiduciary Representation

Our attorneys advise individual and corporate fiduciaries in both New Jersey and Pennsylvania as to the complexities of estate and trust administrations. We aid fiduciaries in collecting assets, paying debts, and ultimately distributing the assets of an estate or trust to the beneficiaries. Through the use of nonjudicial settlement agreements, our attorneys devise creative solutions to facilitate the administration of estates and trusts in an effort to avoid court intervention when possible. Nonetheless, if court intervention is necessary, our attorneys have decades of experience practicing before the Surrogate's Court, the Register of Wills, the Superior Court of New Jersey and the Orphans' Courts in Pennsylvania.

Post-Mortem Tax Planning

Estate planning does not always end when someone dies. Our attorneys utilize post-mortem estate planning techniques to further clients' and their families' tax and non-tax goals even after death. Through the use of disclaimers, our attorneys help fiduciaries and beneficiaries minimize estate, inheritance, and income taxes, while at the same time, creating generational planning opportunities.

Taxes

A cornerstone of our practice focuses on the preparation of federal and state tax returns for trusts and estates. We specialize in preparing Federal Estate Tax Returns, New Jersey Estate and Inheritance Tax Returns, Pennsylvania Inheritance Tax Returns, and federal and state fiduciary income tax returns. Throughout our decades of experience, we have learned to prepare these tax returns to minimize audit exposure in a cost efficient manner.

Audit

When a client's estate, inheritance, or fiduciary income tax return is audited, we advocate for our clients to ensure that the taxing authorities properly apply the tax laws. Because of our extensive knowledge in estate and trust taxation, we frequently achieve settlements in tax controversies with the Internal Revenue Service, the New Jersey Division of Taxation, and the Pennsylvania Department

Attorneys

Courtney E. Dolaway
Janet C. Edelstein
Jonathan H. Ellis
Stephen M. Greenberg
E. Marc Miller
Charles K. Plotnick
Steven S. Poulathas
Alan H. Zuckerman

of Revenue during the audit process. If settlement is not possible, our attorneys are skilled in pursing judicial remedies to protect our clients' interests.

Distributions

The termination of an estate or trust is often the most important aspect of an estate or trust administration. We guide our fiduciary and beneficiary clients through both the informal and formal termination process of an estate or trust. Whether through refunding bonds, releases, nonjudicial settlement agreements, informal accountings, or formal audits, we advise fiduciaries on how best to terminate an estate or trust and how to handle challenges from beneficiaries in a cost efficient manner, and we advise beneficiaries on how to protect their beneficial interests during a trust or estate termination.