PALEY ROTHMAN
ATTORNEYS AT LAW

Estate & Trust Administration

Paley Rothman's estate and trust attorneys understand that administering the estate or trust of a family member or friend can seem overwhelming. The responsibilities of the personal representative (also known as the executor) and trustee may seem endless. Paley Rothman's estate administration team has many years of experience assisting personal representatives and trustees in handling the full range of estate matters. We explain the process, outline all the requirements and deadlines, and provide assistance at every stage.

We prepare documents to be filed with the local probate court, complete estate tax returns for the IRS and state (or D.C.) tax authorities, work with financial institutions to re-title assets, prepare deeds, work with other professionals in valuing estate assets, and assist in paying creditors and beneficiaries. Our skilled team, mindful of the planning and technical opportunities available at the estate level, will advise the personal representative and, when applicable, the beneficiaries of options to preserve and protect estate assets. We work with estates and trusts in Maryland, D.C. and Virginia, handling estates of all sizes and complexity.

We are mindful of the planning and technical opportunities often overlooked by less experienced attorneys. Our skilled estate and trust administration attorneys are able to assess the myriad financial, tax and personal considerations required when handling complicated estates. In addition to handling all of the issues involved in income and estate tax planning, we also are aware of elections available on a postmortem basis. We understand how critical it is for personal representatives and beneficiaries to be aware of these options and elections so they can optimally preserve and protect estate assets.

The estate and trust administration group includes several paralegals with extensive experience and deep understanding of the practical aspects of estate administration. They provide pragmatic solutions and valuable insights while remaining particularly sensitive to the emotional stress often experienced by personal representatives and trustees. Their ability to handle much of the work can be a tremendous relief to family members who have recently experienced the death of a close relative. Their lower billing rates, moreover, help preserve assets for the beneficiaries.

In instances where controversies among beneficiaries, fiduciaries and/or creditors develop, our responsiveness and sophisticated legal assistance can help to avoid time-consuming and expensive proceedings. When such a controversy cannot be resolved amicably, our estate and trust litigators pursue all available legal remedies, including challenges to wills and revocable trusts, interpretation of wills, trusts and contracts, determination of the rights and responsibilities of interested persons, guardianship matters and creditor disputes.

Paley Rothman's complementary practices in estate planning, business succession planning, international estate tax, qualified retirement plans, real estate, income tax and litigation ensure that our clients have the comprehensive and skilled legal resources necessary to represent their interests.

Our estate and trust attorneys' sophisticated insights into the preservation of estate assets and minimizing taxes for future beneficiaries have earned them recognition and awards from *Super Lawyers*, *Best Lawyers in America*, the *Washington Business Journal*, and the *Washingtonian*.

RESOURCE CENTER

Paley Rothman shares this library of resources with clients and friends of the firm to help them stay ahead of legal and business developments and trends. Here, you will find helpful tips and tools written by our attorneys on estate & trust administration topics.

