

**PRACTICE GROUP
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**PROBATE, TRUST, & CONSERVATORSHIP
ADMINISTRATION**

Our attorneys represent beneficiaries, personal representatives, and trustees in all aspects of probate and trust administration matters, including both contested and uncontested matters. We counsel beneficiaries, creditors, personal representatives, and trustees through all phases of probate and trust proceedings throughout California. We also handle contested and uncontested conservatorship matters, and represent family members or fiduciaries in petitioning for conservatorship, contesting a conservatorship, or simply serving as conservator. We combine years of legal experience with a true understanding of the difficulties and emotional components of this work.

Trust administrations:

In trust administration matters, we represent beneficiaries and trustees – whether individuals, private fiduciaries, or banks. We focus on both short-term and long-term goals, handling not only immediate statutory requirements and initial distributions, but also putting a roadmap in place for long-term trust administration that is sensitive to each trust's assets and terms, tax concerns, and beneficiaries' needs. Our attorneys are experienced in assisting families and fiduciaries with a broad spectrum of matters and our trusts and estates litigators are available when an administration becomes contested or unexpected issues arise. Often trust language can be unclear, and our group has decades of experience to draw from when questions of interpretation arise. We help our clients coordinate all aspects of trust administrations, including arranging for accountings, tax preparation, and transfers of real property. Our trust administration practice spans all types of trusts, including revocable family trusts, special needs trusts, and irrevocable trusts such as life insurance or residential property trusts.

Probate administrations:

Generally, when a person dies without a revocable trust in place, his or her estate must go through probate, a lengthy formal process overseen by the court. Our experienced attorneys represent heirs and beneficiaries (including potential heirs), creditors, or personal representatives, to guide them through a routine administration or to protect their interests in a contested matter. With respect to our corporate and private fiduciary clients, we prioritize efficiency and maximize liability protection. Administering a person's estate includes not only court proceedings, but necessarily requires a review of any possible tax implications. Under current laws, most estates do not require payment of estate taxes; however, our tax experts can help to maximize the step up in income tax basis, minimize income taxes, and consider possible gift tax strategies to dramatically improve the tax profile of an estate.

Conservatorships:

When an individual has lost the capacity to manage his or her affairs, we can assist in establishing a conservatorship to provide for his or her financial and medical care. Our practice includes both filing for conservatorships, including on an emergency basis, and representing a conservator on an ongoing basis. We handle conservatorship in contested and uncontested matters with professionalism and sensitivity to the interests of all those involved.

