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# Trusts & Estates

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## **Plan for the Future. Gain Peace of Mind.**

### **Estate Planning**

Estate planning is one the easiest of all legal needs to put off until tomorrow. However, it is critical to have a proper estate plan, especially a will, in place to protect yourself, your loved ones and your assets. At Einbinder Dunn & Goniea, we help clients take care of pressing legal needs in this area with a comprehensive range of quality services for estates of every size.

Our firm's trust and estate practice has been well established for over twenty years. We represent clients in drafting, reviewing and revising estate plans. We also guide estate executors through the probate process and administrators through the administration process, administer trusts and assist in the resolution of estate and trust-related litigation, as is discussed below.

We represent young couples and families formulating their first plan. We map out strategies for successful and wealthy individuals that minimize estate tax risk, protect assets and take care of coming generations. We advise businesses and their owners on business succession plans. What happens to your successful business if something happens to you? We can relieve you of such concerns. We also guide families through the sometimes thorny terrain of planning for the future and handling the needs of an elderly relative.

Specific services offered by our New York law firm's attorneys include:

- Wills;
- Living wills, health care proxies and powers of attorney;
- Business succession plans;
- Trusts for minor children;
- Revocable and irrevocable trusts (inter vivos trusts, life insurance trusts, qualified personal residence trusts and more);
- Guardianships;
- Asset protection and Medicaid planning;
- Choosing fiduciaries; and
- Estate tax planning.

### **Probate and Administration of Estates**

When a loved one dies, you need an attorney to handle the personal and property matters of the deceased individual for you. Probate and administration can be a

highly complex process, and it is therefore best served by counsel from an experienced attorney. Our attorneys have been handling estate probate and administration proceedings since the inception of our firm nearly twenty years ago. Countless proceedings have made us well prepared to handle all aspects of the probate or administration process: marshaling assets, paying off debts, transferring and distributing real property and other assets, and handling estate tax returns. We are even equipped to handle unusual, sensitive or complex matters. We have guided many families through the painful process of seeing to the affairs of a deceased loved one, in a manner that affords dignity to both the decedent and the family, while accomplishing what the decedent intended to be accomplished.

We have also represented numerous clients in the Surrogate's Courts of the State of New York. Our firm has prepared and filed federal and state estate tax returns and has also represented clients in estate and guardianship litigation matters.

### **Probate and Guardianship Litigation**

Sometimes disputes arise involving the administration of an estate or in the management of a guardianship . These disputes can arise in Surrogate's Court or Supreme Court. Our attorneys represent family members, beneficiaries, executors, trustees and others in litigation in those courts. We have extensive experience in representing fiduciaries and claimants in claims relating to wills, trusts and related matters, including:

- Will and Trust disputes;
- Claims against fiduciaries; and
- Contested guardianships.

### **Guardian and Court Evaluator**

Co-founding partner Terrence Dunn has served as both a guardian and a court evaluator in contested proceedings, appointed by the Surrogates of several boroughs. He has represented the interests of incapacitated persons for years at a time, devoting great personal attention to each individual in need of supervision.