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PROBATE & TRUST ADMINISTRATION

The death of a loved one is a challenging time for surviving family members. The myriad of personal and governmentally-required tasks that have to be performed can be daunting even for sophisticated survivors who have been left in charge of the decedent's affairs.

The attorneys in our Trusts & Estates Group provide caring and compassionate assistance in managing those many tasks toward the successful satisfaction of tax and other obligations and ultimate distribution of assets to surviving family members, charities, and others, consistent with the decedent's estate plan. We serve as both a management tool and an experienced resource in handling estate administration matters.

Some of the routine estate administration tasks we handle are:

- Collecting and organizing the decedent's asset and debt information and administering those items consistent with Florida law and the decedent's estate planning documents
- Representing the decedent's personal representatives before the Florida probate courts and the Internal Revenue Service
- Coordinating post mortem federal estate tax planning with federal income tax planning and preparation of income tax returns required during the estate administration period