Trust and Estate

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At Damon & Morey LLP, we are keenly aware of the fact that estate planning is a personal and highly individualized matter. We work with the client to identify his or her wishes and goals, to obtain family and financial information and to develop the documents that are required to accomplish the client's objectives.

In addition to designing personalized methods in order to execute a client's wishes, our goal is to maximize tax benefits (estate, gift, generation skipping and income tax benefits) and to minimize the costs of the ultimate transfer of assets to the client's beneficiaries. This is accomplished through careful planning throughout a client's life and effective administration following death. In addition, we often assist personal representatives, trustees, and beneficiaries on how to handle estate administration to optimize all tax benefits. Our Business and Corporate attorneys work closely with our Trust and Estate Department to provide the proper scope of expertise for small business owners developing an estate plan.

Because estate administration can be very intimidating, our objective is to execute the wishes of the deceased as smoothly as possible. The attorneys in our estate department explain aspects of the estate plan to the beneficiaries and the personal representative and trustee. In many instances, we will oversee the collection and distribution of assets, record keeping, estate and income tax return preparation, representation of the fiduciary and probate proceedings, as well as related litigation. We believe that it is important to assist our clients in recognizing their estate planning options and to help them keep aware of changing rules.

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