

PRACTICE CONTACT

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TRUST AND ESTATE LITIGATION

Our team provides strategic guidance and compassionate representation designed to help clients achieve the results they want. We understand the importance of preserving business and family relationships where possible and we know the world of trust and estate disputes is fraught with emotion, tough legal questions and hard-fought litigation if a matter cannot be resolved. Our unique approach partners battle-tested trust and estate litigators with experienced estate planning attorneys to provide clients with a comprehensive understanding of their situation, and develop winning strategies in and out of the courtroom, depending upon our clients' objectives.

Our work

- Fiduciary duty and other claims against trust or estate fiduciaries, including self-dealing, breach of trust, and conflicts of interest
- Will and trust contest actions and other litigation over the validity and effect of wills and trusts
- Determining and enforcing rights and obligations under trust documents
- Trust and estate asset valuation
- Recovery of trust and estate assets
- Fiduciary accountings
- Disputes involving gifts of assets or other pre-death transfers
- Claims against the estate
- Claims for life insurance benefits and other benefits payable on death
- Disputes with the Internal Revenue Service and state tax authorities (estate, gift, generation-skipping transfer, and income tax)

Our proven record of success

- After winning an appeal upholding a defense verdict on multiple claims of breaches of fiduciary duty by a corporate trustee, we recovered \$1 million in fees in settlement.
- On behalf of the fiduciary and a major university named as beneficiary, we obtained a defense verdict against claimants seeking to invalidate trust terms.
- We obtained a multi-million dollar verdict against co-guardians who mismanaged and diverted guardianship account funds—the largest such verdict in the history of Franklin County.
- In a will contest involving the largest claims in memory in Ohio, we obtained a unanimous jury verdict on behalf of the individual named as executor and trustee of a charitable foundation, despite allegations of forgery and undue influence.
- We successfully represented clients against allegations involving claims of fraud, incapacity, and undue influence in the sale of stock in a closely held corporation shortly before the seller's death.