

Trusts & Estates

Overview

As the population ages and individuals are living longer, assuring a comfortable retirement while preserving the estate for future generations has become a complex balancing act that requires careful planning.

Best Best & Krieger LLP's established team of Trusts & Estates attorneys advises on all aspects of estate planning, wealth management, and trusts and fiduciary dispute resolution.

Wealth Management & Estate Planning

We help clients devise wealth management plans to build and secure their estates, optimize their financial security, establish successful business plans and accomplish their wealth-sharing intentions. Our attorneys offer boutique-level experience and personal attention backed by the resources of a leading, full-service law firm. Working closely with clients, their accountants and financial advisors, we use wills and a wide variety of trusts, investment vehicles and wealth-transfer arrangements to create a tailor-made, comprehensive and strategic wealth management plan to meet our clients' current and future needs, as well as their overall estate planning goals.

We regularly advise on and assist with:

- Asset protection and distribution
- Business succession planning for closely held, family-owned and other businesses
- Estate planning, probate, will and trust preparation and administration
- Charitable giving, private foundations and trusts
- Elder law, elder care, and physical and financial elder abuse
- Estate, gift, generation-skipping and income tax issues
- Executor and trustee responsibilities
- Guardianships/conservatorships and special needs trusts
- Health care planning, Medi-Cal, Medicaid/Medicare, and advance health care directives
- Investment vehicles and long-term investment strategies
- Life, disability and health insurance coverage
- Marital agreements and community property rights
- Probate, probate avoidance and estate management

Key Contacts



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- Retirement benefits, pensions and qualified and nonqualified deferred-compensation arrangements
- Revocable and irrevocable trusts
- Powers of attorney
- Probate and trust litigation
- Tax-efficient wealth transfer strategies, tax elections and disclaimers
- Evaluating estate plans in light of life-changing events such as births, deaths, marriages, divorces and incapacities

Dispute Resolution

Recognizing that legal, factual and emotional considerations all come into play in litigation, we strive to prevent trust and estate disputes and seek to resolve unavoidable disagreements through negotiated settlements. In this way, we often avoid resorting to costly, contentious and time-consuming litigation.

Our attorneys have successfully resolved a wide variety of disputes for families, business owners, corporate and private fiduciaries, executives, administrators and beneficiaries, including:

- Breach of fiduciary duty, undue influence, fraud, self-dealing, misappropriation of funds, and conflicts of interest claims
- Petitions for appointment or removal of fiduciaries and fiduciary accountings
- Will and trust contests and disputes over the validity, interpretation and enforceability of provisions and amendments
- Estate-related disputes and estate resolution
- Incapacity/competency claims and appointments of conservators/guardians
- Trustee removal actions
- Asset and estate recovery, valuation and accounting disputes
- Elder abuse allegations
- Community property rights and terms and impact of prenuptial and post-nuptial agreements
- Acquisition and disposition of businesses and professional practices
- Tax controversies
- Revocable and irrevocable trust disputes
- Powers of attorney and disputes regarding health care

Combining legal know-how with compassion and personal attention, BB&K Trusts & Estates attorneys serve clients in and out of court, helping them establish, maintain and pass on their estates in accordance with their wishes.

People



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VCARD

Connected Industries

[Business](#)

[Franchise Law](#)

Related Practices

[Business Litigation](#)

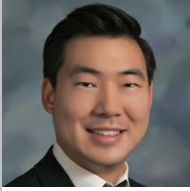
[Business Transactions](#)

[Mergers & Acquisitions](#)

[Real Estate](#)

[Tax](#)

Areas of Focus: Trusts & Estates



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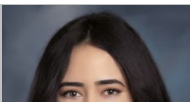
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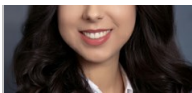
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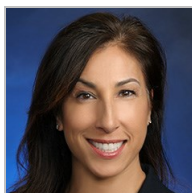
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News & Events

PRESS RELEASES | JUL 08, 2019

BB&K Ranked No. 202 on NLJ Largest Law Firms

Growth Attributed to a Niche Public Law Focus and Great Results

PRESS RELEASES | JUN 11, 2019

Two BB&K Partners Named Coachella Valley Top Lawyers

Henry Welles and Robert Hargreaves Selected by *Palm Springs Life Magazine*

AUTHORED ARTICLES & PUBLICATIONS | MAY 22, 2019

Expert Witnesses: Effective Questioning

Litigator Scott Ditfurth Shares Best Practices in Riverside Lawyer

AUTHORED ARTICLES & PUBLICATIONS | MAY 22, 2019

Rooms with a View: Cross-Examining Experts in Depositions

BB&K Partner Mark Easter Walks Us Through the House of Depositions in Riverside Lawyer Magazine

PRESS RELEASES | MAY 13, 2019

BB&K One of 200 Largest Law Firms in the U.S.

Law360 Annual Ranking Reflects Firm's Continued Recent Growth

BB&K IN THE NEWS | FEB 27, 2019

American Lawyer Discusses BB&K Growth Last Year

Firm Expands to Meet Client Demand

PRESS RELEASES | OCT 16, 2018

Best Best & Krieger Marks 25 Years in San Diego

Proud to Serve, and Grow With, Its Community

PRESS RELEASES | SEP 06, 2018

Partner George Reyes Named a San Diego Influential Leader

Annual List Recognizes Top Professionals in San Diego County

AUTHORED ARTICLES & PUBLICATIONS | AUG 20, 2018

Best in Law: Estate Planning Essential for Business Owners, Too

Damian Northcutt Explains in the Riverside Press-Enterprise How an Estate Plan Can Provide for How a Business Will be Run After Death or Retirement

PRESS RELEASES | JUN 07, 2018

Isabel Safie and Jill Tremblay Return to 2018 So. Cal. Super Lawyers Rising Stars List

The BB&K Attorneys Acknowledged Again for Practice Achievements

BB&K IN THE NEWS | JUN 01, 2018

Brent Collinson Admitted to U.S. Supreme Court Bar

Attorney Recently Merged Firm with BB&K, Sierra Sun Reports

EVENT | APR 20, 2018

2018 Financial Elder Abuse Symposium

Trust and Estates Section of the California Lawyers Association

EVENT | APR 18, 2018

2018 Federal Civil Practice Seminar

Federal Bar Association Inland Empire Chapter

BB&K IN THE NEWS | AUG 22, 2017

Jill Tremblay Named GCVCC Chairman of the Board

BB&K Attorney Takes Helm of Greater Coachella Valley Chamber of Commerce

AUTHORED ARTICLES & PUBLICATIONS | AUG 15, 2017

Best in Law: The Pros and Cons of the No-Contest Clause

Trusts and Wills

PRESS RELEASES | JUN 07, 2017

Five BB&K Attorneys Included on Palm Springs Life 2017 Top Lawyer List

Coachella Valley's Best Lawyers Recognized in Magazine's Annual List

PRESS RELEASES | JUN 05, 2017

Southern California Super Lawyers Rising Stars 2017

Two BB&K Attorneys Included on Respected List

VIDEOS | NOV 18, 2016

D. Brian Reider Video Bio

Partner

VIDEOS | NOV 18, 2016

Lauren Strickroth Video Bio

Partner

VIDEOS | NOV 18, 2016

Richard T. Egger Video Bio

Partner

PRESS RELEASES | JAN 11, 2016

Two BB&K Attorneys Promoted to Partner

Plus, Partnership Elects New Member to the Firm's Executive Committee

BB&K IN THE NEWS | JAN 09, 2015

Calif. Real-World Training Rules May Spark National Trend

BB&K Partner Richard Egger Discusses With Law360 the New State Bar Requirement for Pro Bono Work

CLIENT SUCCESSES | DEC 29, 2014

BB&K Attorney Wins Trust Trial

Verdict upholds validity of handwritten trust amendment
