



Estates, Trusts & Probate

Overview

The Estates, Trusts & Probate Group at Tucker Ellis advises clients in developing sophisticated estate plans to achieve their family and charitable goals, while minimizing federal gift, estate, and generation-skipping taxes and protecting assets. Our attorneys serve a variety of clients, including families, owners of closely held businesses, professionals, real estate developers, corporate executives, private investors, and entrepreneurs. The plans created by our team allow for the seamless management, transition, and protection of assets from one generation to another.

Our team of experienced attorneys handles trust and estate administrations and advises fiduciaries on their roles and obligations. Our attorneys counsel on the management of complex assets, the preparation of federal estate tax returns, and fiduciary accounting and income tax compliance, as well as handle controversies when they arise among beneficiaries or between fiduciaries and beneficiaries.

Areas of Emphasis

- Draft wills, trusts, powers of attorney, and other estate planning documents
- Formulate estate plans to reduce gift, estate, and generation-skipping taxes
- Provide advice on charitable giving
- Handle all aspects of trust and estate administrations
- Prepare gift tax returns and estate tax returns and advise on fiduciary income tax returns
- Counsel on business succession plans
- Handle probate and trust litigation matters
- Administer guardianships and advise guardians
- Advise bank trust departments and trust companies in fiduciary matters
- Negotiate and prepare pre-marital agreements
- Counsel with respect to federal, Ohio, and Florida law

Representative Positions

- Two Fellows of the American College of Trust and Estate Counsel
- Two past Chairs of the Estate Planning Institute for the Cleveland Metropolitan Bar Association
- Past President of the Estate Planning Council of Cleveland
- Two Ohio State Bar Association Certified Specialists in Estate Planning, Trust and Probate Law
- Member of the Ohio State Bar Association Estate Planning, Trust & Probate Law Section

- Member of the Executive Council of the Estate Planning, Probate & Trust Law Section of the Cleveland Metropolitan Bar Association