

Estate & Trust Administration

Working Closely with Estate Representatives Throughout the Process

Administering an estate for family members or other loved ones can sometimes be burdensome for the person nominated to settle the estate. Our estate administration attorneys and paralegals work closely with personal representatives to ensure that they not only accomplish their legal duties, but we also help them better understand the probate process and issues in estate settlements. By molding our services to their needs, we assist personal representatives from initially filing the necessary paperwork with the Register of Wills, through determining and filing the appropriate tax returns required by local, state and federal governments, to making final distributions to the beneficiaries. Our experienced counsel and staff are especially sensitive to the emotional issues that can arise in the administration process among grieving parties and work to maintain family harmony.

Providing Cost-Efficient and Effective Estate Administration

Estate administration consists of locating, gathering, inventorying, valuing and liquidating assets, providing the necessary statutory notices and advertisements, satisfying claims against the estate according to law, paying all administrative costs, filing all necessary tax returns and ultimately distributing the estate to its beneficiaries. We have decades of experience mastering the process and can efficiently and effectively administer estates. We have invested in sophisticated computer software which is utilized by our attorneys and paralegals to collect inventory and accounting information into one database, saving time and reducing the cost of preparing the necessary documents and tax returns for the estate. We have established an efficient process to prepare and serve the required notices to state agencies, beneficiaries and creditors, file the necessary tax documents and obtain releases necessary to distribute the assets. Our goal is to administer the estate efficiently and to distribute the assets as soon as possible.

Serving as Local Counsel for Out-of-State Personal Representatives

Administering an estate can be considerably more difficult for a personal representative who does not live in Pennsylvania. For out-of-state personal representatives, we offer a wide range of resources to assist them in accomplishing administrative duties without the necessity of their traveling to Pennsylvania. We keep them closely advised about the progress of our work throughout the administration process.

Dealing Effectively with Estate Disputes

Sometimes settlement of an estate involves litigation. Our attorneys, who can represent the estate, an heir or third party such as a creditor, are experienced in many types of litigation involving estates, including will contests, spousal elections, challenges to the testamentary capacity and other probate litigation. Estate litigation is often complicated and can be emotionally charged. Our attorneys have many years of experience serving as assertive advocates for our clients.

Efficient Trust Administration

Estate plans often include trusts ranging from testamentary trusts, living trusts, irrevocable trusts, charitable trusts, life insurance trusts and charitable remainder trusts. Our experienced attorneys and paralegals will guide and assist trustees in the proper administration and distribution of trust assets. For the duration of the trust, we will provide annual statutory notices to beneficiaries, prepare annual accountings, prepare and obtain necessary releases for interim and final distributions and assist in ensuring all tax returns are filed.

Recent Updates & Recommended Articles from the Lancaster Law Blog:

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- Pennsylvania Power of Attorney: One of the Most Important Decisions in Your Estate Plan**
Of course estate planning involves making a will, and most people see the will as the most important aspect of estate planning. Choosing to establish a power of attorney, however, may be the most important decision that a person makes when creating their estate plan.
- What Happens to the Money in a Joint Account After One Party Dies?**
Joint accounts are often meant to make the financial lives of the parties involved easier, such as in the case of marriage or in a caretaker situation. But what happens when one party dies? Does the money automatically belong to the remaining party?
- Long-term Care Insurance Could Protect your Estate Plans**
Long-term care insurance policies were designed to deal with the significant costs associated with personal-care services, ranging from home care to skilled nursing facility care. Without long-term care insurance to pay for these services, most individuals spend all of their assets until they qualify for Medicaid.

Attorneys

- Craig V. Russell
- Gary G. Krafft
- Jon M. Gruber
- Lindsay M. Schoeneberger

Range of Services

- Administer/Probate Estates
- Testate (with Wills)
- Intestate (without Wills)
- Preparation of Inventories & Accounts
- Preparation of Notices
- Department of Public Welfare
- Beneficiaries
- Creditors
- Attorney General
- Assist with Valuations and Appraisals
- Preparation of Tax Returns
- PA Inheritance Tax Return
- Fiduciary Tax Returns
- Federal Estate Tax Returns
- Formal Administration with Audit & Adjudication
- Informal Administration with Account & Release

Related Services

- Estate Planning & Wills
- Taxation - Individuals, Families & Estates
- Real Estate - Residential
- Real Estate - Commercial
- Civil Litigation & Dispute Resolution
- Title Agency - Lititz Pike Abstracting Co., Inc.

Helpful Links

- IRS - Estate & Gift Taxes
- PA Department of Revenue - Inheritance Tax