

CAPABILITIES / TRUSTS & ESTATES

Trust & Estate Administration

In addition to sophisticated estate planning advice to help preserve wealth, we also provide counsel on all phases of estate and trust administration, trust law, fiduciary law and fiduciary responsibilities to executors and administrators of estates.



OVERVIEW

“Our compassionate approach to estate administration alleviates the bureaucracy and burden for the family as we guide our clients through what can be a challenging and emotional process.”

Our Value

Members of Obermayer’s Trust and Estate team are well-regarded in their field. They include:

- Members, and two past chairs, of the 600-member Probate and Trust Law section of the Philadelphia Bar Association;
- A Fellow and former Board of Regents and Pennsylvania State Chair of the American College of Trust and Estate Counsel (ACTEC); and
- An attorney scheduled to step up as ACTEC’s Pennsylvania chair in March 2020.

ACTEC is a national organization of attorneys elected to membership by demonstrating the highest level of integrity, commitment to the profession, competence, and experience as trust and estate counselors. In addition, our attorneys are frequently called upon to write and speak on estate planning, estate and trust administration and professional ethics for the Pennsylvania Bar Institute and other organizations.

The administration of the estate or trust of a deceased individual requires certain standard procedures from the executor or trustee in order to distribute assets in accordance with the decedent’s wishes and applicable state and federal law. These procedures can seem onerous in an already difficult time, and our Trust and Estate lawyers are available to assist clients with the probate process, collection and valuation of assets, notices to appropriate parties, preparation and filing of all necessary forms, inventories and tax returns (estate, inheritance, gift and income taxes), and the sale of real property and business interests. We prepare fiduciary accounts for the settlement of estates and trusts in an informal setting, as well as

with formal court audits. In addition, if an inheritance, gift or estate tax return has been challenged, we handle appeals of adverse tax decisions.

In the area of trust administration, our team can provide the necessary bookkeeping and tax return preparation for on-going trusts, provide guidance on fiduciary duty and proper investment management and frequently represent fiduciaries in connection with the filing of interim accounts, or other uncontested proceedings before the courts.

Our Clients

We routinely provide advice and guidance to executors and trustees, as well as to the beneficiaries of trust funds, on the proper and most tax-efficient means of administering probate and non-probate estates and trusts. In the event that fiduciary funds have been set up for the benefit of incapacitated persons or minors, we also represent guardians in their role as administrators of such funds.

Our Focus

Our team focuses on bringing a compassionate approach to helping families through transitions after death and work closely with our clients to help them fulfill their responsibilities as executors and trustees. We regularly assist clients in administering trust assets and advise them on all aspects of fulfilling their fiduciary duties. Whether the estate requires probate and a formal accounting and termination process, or an informal termination, we bring our extensive experience to bear in all aspects of estate administration to protect the interests of beneficiaries.

Awards Won*





*[Click here](#) for a description of the standard or methodology on which the awards and honors are based. No aspect of this advertisement is approved by the Supreme Court of New Jersey.

ATTORNEYS

Key Contacts

Nina B. Stryker

PARTNER
215.665.3057
nina.stryker@obermayer.com

Paul C. Heintz

PARTNER
215.665.3212
Paul.heintz@obermayer.com

Stephanie A. Henrick

PARTNER
610.234.4871
Stephanie.Henrick@obermayer.com

Jerome N. Kline

OF COUNSEL
215.665.3086
jerome.kline@obermayer.com

Joseph J. McGovern

PARTNER
215.665.3058
Joseph.McGovern@obermayer.com

Melissa Siravo Hensinger

ASSOCIATE
215.665.3257
melissa.hensinger@obermayer.com

Robert I Whitelaw

OF COUNSEL
215.665.3206
robert.whitelaw@obermayer.com

Brett Wiltsey

PARTNER
856.857.1435
brett.wiltsey@obermayer.com

Diane M. Zabowski

PARTNER
610.234.4877
diane.zabowski@obermayer.com

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