



## Trust & Estate Administration

Trust and estate administration can often be unintentionally challenging due to a variety of reasons such as changing laws, family dynamics, and the estate planning tools selected.

Institutional and individual clients such as business owners, professionals, families, and retirees are among the clients who seek our counsel. The issues our trust and estate administration attorneys regularly handle on behalf of administrators include:

- Identification of proper tax-planning techniques
- Discretionary distributions of income or principal to one or more beneficiaries
- Acquisition, disposition and expenditure of assets
- Complex will contests
- Trust administration disputes
- Fiduciary malpractice defense
- Probate and trust litigation matters
- Preparation of notices, accountings, petitions, and orders for the Court in addition to both estate and income tax returns

Foster Swift attorneys practicing in this area are highly regarded by peers and clients for their legal skills and professionalism. More than half the group is recognized in Best Lawyers in America and three are members of the American College of Trust and Estate Counsel, an elite organization of the top estate planning and administration attorneys in the country.

### PUBLICATIONS & ALERTS

Understanding and Avoiding Post-Death Disputes, *Foster Swift Agricultural Law News*, January 30, 2019

Michigan Probate Litigation, *Institute for Continuing Legal Education (ICLE)*, October 15, 2017

How to Make Your Eventual Executor Less Stressed Out, *go60.us*, April 3, 2015

Michigan Trust Code Takes Effect April 1, 2010, *Foster Swift Estate Planning Insights*, Winter 2009

Roth IRA's, Estate Planning, and the 2010 Conversion, *Foster Swift Estate Planning Insights*, Winter 2009

### ATTORNEYS

#### Shareholder

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### RELATED PRACTICES

Elder Law  
Estate Planning  
Trust & Estate Litigation



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**NEWS**

Foster Swift Elects Officers for 2023, *Ingham County Legal News*, February 15, 2023

Foster Swift Elects Four Shareholders, January 10, 2022

Fedor and Genovich join Michigan State Bar Foundation Fellows, *Michigan State Bar Foundation*, November 11, 2021

Tjapkes Joins Grand Rapids Office of Foster Swift, January 26, 2021

Amanda Martin Joins Foster Swift, *Detroit Legal News*, September 30, 2020

Collins, DeLuca Named to ICBA's Top 5 under 35 Attorneys, *Lansing Regional Chamber*, March 22, 2019

Firm Elects Executive Committee Members for 2019, *Michigan Lawyers Weekly*, March 7, 2019

Foster Swift Elects New Shareholders, *Lansing Regional Chamber*, January 21, 2019

Foster Swift Welcomes Krueger to the Firm, October 2, 2018

Foster Swift Launches Elder Law Blog, May 23, 2018

Foster Swift Southfield Office Has Second Growth Spurt, September 18, 2017

Seven Foster Swift Attorneys named "Lawyer of the Year", April 9, 2013

Foster Swift Welcomes New Associate Erica Huddas, April 14, 2010

**EVENTS**

Apply 2020 Discovery Rules in Probate Litigation, *Institute for Continuing Legal Education (ICLE)*, January 9, 2020

Digging into the Issues of Holding Real Estate in Trust, *59th Annual Probate & Estate Planning Institute*, May 2019

Anatomy of a Trust, *59th Annual Probate and Estate Planning Institute, State Bar of Michigan, Probate and Estate Planning Section*, May 16, 2019

Trusts 101: Estate Planning for the Disabled, November 14, 2018

Foster Swift Attorneys Present Trusts Seminars, *National Business Institute (NBI)*, November 14 and 15, 2018

Trusts 101: Grantor Trusts and Ethics, *National Business Institute (NBI)*, November 14, 2018

ADMINISTERING THE ESTATE EFFECTIVELY and MAINTAINING AN ETHICAL BALANCE IN PROBATE PRACTICE, *Probate Process from Start to Finish (NBI)*, October 16, 2018

Step by Step Guide to Drafting Wills and Trusts, *National Business Institute (NBI)*, September 13, 2018

Panelist on the 2018 Entrepreneurs Forum, *Southeast Michigan Entrepreneurs Association, Southfield Area Chamber of Commerce*, May 18, 2018

Nonprobate Transfers, *58th Annual Probate and Estate Planning Institute, State Bar of Michigan, Probate and Estate Planning Section*, May 17, 2018

Probate Process from Start to Finish, *National Business Institute*, May 4, 2018

Drafting Effective Joint Trusts, *Upper Michigan Legal Institute: State Bar of Michigan*, June 2016

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Wrapping Up Trust Administration, *55th Annual Probate and Estate Planning Institute, State Bar of Michigan, Probate and Estate Planning Section*, June 2015

Farm Succession and Estate Planning, *Michigan Farm Bureau*, January 27, 2015 & February 4, 2015

Administering "Insolvent" Estates, *Ingham County Bar Association*, 2013

Trust Accounting, *Lorman Education Services*, June 2, 2006

Probate and Trust Administration Under EPIC, *Wayne County Probate Court Mandatory Attorney Training*, October 21, 1999

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