

## TRUST, ESTATE & FIDUCIARY LITIGATION

### OVERVIEW

Our team experienced in trust and estate fiduciary litigation. They handle the tax, probate and fiduciary issues involved in complex trust, estate, tax, conservatorship, guardianship and similar matters in trial and appellate courts nationwide. Our team spans the globe; we readily use lawyers from different offices to work together on cases or projects to bring our clients the best and most efficient service possible.

### WHAT WE DO

- Trust disputes: modifications, construction & contests
- Will contests
- Breach of fiduciary duty claims
- Undue influence, lack of capacity or fraud claims
- Business and asset valuation disputes
- Trustee or executor removals
- Charitable trusts and foundation disputes
- Probate and estate litigation
- Disputes between executors or trustees and beneficiaries
- Power of attorney disputes
- Litigation avoidance analysis

### WHO WE REPRESENT

- Banks & financial institutions
- Trust companies

- Charitable entities
- Family offices
- Trust & estate beneficiaries
- Corporate fiduciaries
- Trustees and executors
- Individuals and families

## MEET THE TEAM



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## RELATED PRACTICE AREAS

- Private Client
- Business & Commercial Disputes

## RELATED INSIGHTS

Insights

Sep 07, 2023

### **Call for Vacatur of Massachusetts' Fiduciary Duty Standard for Broker/Dealers**

Key Takeaways: The Massachusetts Supreme Judicial Court upheld the fiduciary duty standard of care imposed on broker/dealers by the Commonwealth of Massachusetts on August 25, 2023. Below we explain the practical implications of the recent court opinion and highlight why the United States Supreme Court should grant a Writ of Certiorari and vacate the Massachusetts' fiduciary duty standard.

Awards

November 4, 2021

### **U.S. News - Best Lawyers® 'Best Law Firms' 2022**

News

Feb 23, 2021

### **Sherby in 'Tax Notes' on Democrats' Tax Priorities**

Insights

Apr 16, 2020

### **U.S. – COVID-19 Litigation Risks of COVID-19 Remote Witness and Notary Laws**