

Trusts & Estates

Efficiency for the Basic. Expertise for the Complex.

FMJ's Trusts & Estates group provides estate planning, estate administration, business and unique asset succession planning, estate controversy assistance and related services to individuals, closely-held businesses, tax-exempt organizations and corporate fiduciaries.

Estate Planning

Planning for incapacity or death is essential for every adult, regardless of age, health or net worth. Our Trusts & Estates attorneys thrive on devising creative solutions and providing tailored services for individuals and families to help them achieve their lifetime dreams and goals. We specialize in wills, revocable living trusts, irrevocable life insurance trusts, charitable trusts, family limited partnerships, special/supplemental needs trusts, powers of attorney, and health care directives.

Trust and Estate Administration

Our attorneys assist personal representatives, trustees and beneficiaries in all aspects of estate and trust administration. This includes assisting trustees in trust management, administration or distribution, representation in the probate process, or any variety of complex situations that may arise in trust and estate administration.

Business and Unique Asset Succession

Just as every individual should have an updated estate plan, every business owner should carefully consider the succession of their business interests and implement a cohesive plan. Succession planning involves structuring a plan for the transfer of ownership, control and management of the business. We frequently work with business owners to develop and implement estate plans that work in conjunction with business succession plans. Similarly, unique family assets (such as cabins, art collections or farmland) also require a planned succession strategy. Our Trusts & Estates group draws on an abundance of experience in succession planning for present and remainder interest holders.

Tax-Exemption Organizations

In addition to advising individual clients on how to maximize the impact of charitable giving, our attorneys provide a full array of services to tax-exempt organizations, including serving as outside counsel to a number of tax-exempt entities, public charities and private foundations. For clients interested in creating a charitable entity, our practice group provides services associated with the formation and operation of such entities, as well as representation before the IRS, state revenue authorities and other regulatory agencies.

Estate Controversy

When a trust or estate dispute arises, our attorneys draw on their extensive knowledge and experience, as well as the strength of our firm's notable litigation practice. This includes representing executors, trustees or beneficiaries in trust and estate early controversy counseling, alternative dispute resolution and litigation.

FMJ Professionals

David M. Ness
Karen A. Schlotthauer
Jared D. Peterson
Matthew M. Jensen
Nicole M. Flaherty
Kate Z. Graham

We represent clients in all facets of estate planning, asset succession and estate administration. Expertise and efficiency are the hallmarks of our Trusts & Estates group.



Elder Law

Elder law is a multi-disciplinary legal approach to addressing questions like: do you know what you will do if you become disabled due to age or disease? Who will manage your finances? Who will make healthcare decisions for you? How will you afford the cost of long-term care? With all the wisdom that comes with age, we as a community have a special duty to treat our elders with respect and dignity and our Trusts & Estate group is here to help.