

# Trusts and Estates

---

Gordon Arata Montgomery Barnett's trust and estate lawyers help clients develop and create personalized estate plans to address their specific needs. We provide advice regarding tax reduction strategies to preserve the maximum amount of wealth possible for clients' intended beneficiaries and heirs while still providing flexibility and control during life.

Our services include:

- Establishing or amending estate plans
- Help with asset protection
- Creating powers of attorney or advance medical directives
- Creating trusts, last wills and testaments, life insurance trusts, spendthrift trusts or special needs trusts
- Help with the probate process and estate administration
- Seeking guardianships and advising on the complicated guardianship process
- Business succession planning
- Formation of Family Limited Partnerships
- Preparing buy-sell agreements
- Probate, trust and estate litigation and fiduciary representation
- Aiding succession representatives in the administration of simple and complex estates

Our attorneys regularly advise fiduciaries, executors and administrators of estates, trusts, and trustees and handle contested trust, probate and succession matters, drawing on Gordon Arata Montgomery Barnett's full litigation capabilities. For example, we have represented:

- The trustee of a trust in challenging the validity of the will which created the trust
- The heirs of a succession against claims for reimbursement by a dissatisfied surviving spouse
- The heir of a succession in prosecuting a claim for return of succession assets upon the termination of a usufruct
- A spouse in a contested partition of community property upon divorce

Probating wills is an important part of our trusts and estate practice, along with the preparation of federal estate and gift tax returns. We also help numerous non-Louisiana clients with ancillary probate proceedings in Louisiana.