

Representing Sacramento's families, business owners, nonprofit organizations (including charitable foundations), and trust companies in a range of sophisticated trust, estate, litigation, business, and tax matters.

## OVERVIEW

Our attorneys in Sacramento specialize in comprehensive estate planning, family business transition, and estate administration services. We offer expert guidance on a wide range of estate planning tools, including wills, various types of trusts (such as revocable living trusts, irrevocable life insurance trusts, and qualified personal residence trusts), charitable giving structures, and private foundations. Our experienced estate planners excel in strategies to minimize or avoid gift, estate, and generation-skipping transfer taxes, utilizing advanced techniques like dynasty trusts and family limited partnerships.

We prioritize clear communication with our clients, carefully explaining the pros and cons of different approaches and innovative solutions to ensure that each client's estate plan accurately reflects their unique wishes and objectives.

The trust and estate attorneys at our firm have extensive experience representing clients in complex matters involving fiduciary conduct, including defense of fiduciaries, indemnification issues, fiduciary removal proceedings, and breach of fiduciary duty claims. Recognizing the sensitive nature of estate and trust disputes, we provide strategic advice to fiduciaries on effective beneficiary communication and prudent courses of action to mitigate potential litigation risks.

## KNOWLEDGEABLE COUNSEL

Our group consists of attorneys and related professionals, several of whom hold a master-of-laws degree in taxation or are certified public accountants. Other credentials and memberships include, presently and historically, Fellows of the [American College of Trust and Estate Counsel \(ACTEC\)](#); membership in The Group and in the American Bar Association (Taxation Section); board certified specialists (Arizona) in estate and trust law and in tax law; adjunct professors; members of for-profit boards of directors, and of professional, community, and charitable councils and boards. Our attorneys have lectured extensively on estate planning, taxation, and related topics, educating other lawyers, accountants, and professionals locally and throughout the United States.

We cultivate talent to address the full ambit of personal, business, tax, civic, and charitable areas. In addition to trust and estate client services, we offer significant experience in corporate law, partnerships, limited liability companies, real estate development, employment law, civil and business litigation, and executive compensation and employee benefit plans.

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Our team comprises highly qualified attorneys and professionals, many of whom hold advanced degrees in taxation or are certified public accountants. Our members' credentials include

Fellows of the American College of Trust and Estate Counsel (**ACTEC**), participation in The Group, and membership in the American Bar Association's Taxation Section.

Our Sacramento attorneys are well regarded for their expert knowledge, lecturing extensively on estate planning to other attorneys and CPAs throughout California.

We take the complexity out of the planning process. For example, we develop and implement understandable estate plans that can carry out the personal and family objectives of our clients in a sensitive manner. We believe estate planning should take into account opportunities that occur during the person's lifetime, so we plan for current and projected changes in federal and state income, and estate and gift tax laws, to help minimize the need to update the plan any more frequently than necessary.

## **ESTATE PLANNING**

Whether you simply want to be able to pass what you have to a spouse, child or other family member or friend (or if you are a high net worth individual, senior corporate executive or the owner of a privately held business) we can provide you with more business transition and estate planning experience and expertise in our office than any other firm in Northern California.

The perfect estate plan, above all else, is personal. Our experienced estate planning attorneys can do more than list what revocable or irrevocable trusts, gifts, sales and transition plans might be available to you. Knowing which options and methods can best help you achieve your personal objectives, and how to implement them, is what separates our experienced estate planning attorneys from the rest.

## **EVERY TRUST IS DIFFERENT**

There's much to do when it comes to trust administration. The terms of the trust generally control the administration, so be sure to read the document before doing anything.

Every trust is different. Some trusts hold a small amount of property and are terminated within a very short time after the grantor's death. Other trusts hold millions of dollars worth of property and provide income to trust beneficiaries for many years. Sometimes a trust becomes the subject of litigation when a beneficiary disputes how the trustee is administering the trust. A trust dispute can also arise when a disgruntled heir challenges the testator's estate plan.

The amount of work involved in administering a trust varies depending on a number of factors. You must consider the type of trust you're dealing with, and then the number of beneficiaries. The size and type of trust is influenced by the amount of property within the trust, and the duration of the trust. And then you must consider how many creditors are making claims against the trust, which means a lot of paperwork that must be accounted for.

## **CONSERVATORSHIPS AND GUARDIANSHIPS**

### **Conservatorship**

When a loved one develops difficulties in managing his or her financial affairs (or in providing for personal needs as a result of illness or advanced age) sometimes it is necessary for family or friends to obtain court authority to act on the individual's behalf. This is especially relevant when the individual has not executed the appropriate estate planning documents or resists such assistance. In California, this is accomplished through a proceeding known as a conservatorship.

If you are planning to seek conservatorship over a loved one, you will want to ensure that you have qualified legal assistance to guide you through the process. Our probate attorneys have extensive experience in the area of conservatorships and have handled numerous complicated

conservatorship matters, including contested conservatorships and limited conservatorships. Let us help you help your loved ones.

### **Guardianship**

Guardianships are complicated proceedings and are difficult to navigate without expert legal advice. Here, at Fennemore, our probate attorneys have extensive experience in assisting clients in establishing guardianships of the person and estate.

### **SACRAMENTO LOCATION**

10640 Mather Blvd STE 200, Mather, CA 95655

**Phone: 916-920-5286**

### **OTHER LOCATIONS**

[View our main Trusts & Estates service page](#)