

## Trust & Estate Litigation

Trust and estate litigation involves a wide range of disputes including misconduct by trustees or personal representatives, mismanagement of assets by those owing fiduciary obligations, and undue influence by interested parties over those establishing estate plans, including wills and trusts. Stoll Berne lawyers have represented clients in all aspects of these disputes, including cases involving:

- **Self-dealing and Mismanagement of Assets:** Our lawyers have represented beneficiaries who claimed that trustees stole assets intended to benefit our clients. We have also represented personal representatives, conservators, and guardians protect or recover assets that were misused.
- **Business Dealings and Investment Strategies:** We represented a trustee seek recovery of the fair value of stock subject to a mandatory redemption at the time of death. We have also represented beneficiaries who alleged that the trustee established investment strategies intended to benefit certain beneficiaries over others.



## We Deal Sensitively With Matters Involving the Protection of Your Family and Trust Assets



- **Undue Influence and Lack of Capacity:** Stoll Berne has represented family members who lost an intended inheritance after others were able to unduly impose their wishes into the estate planning process. We have also helped clients who believed that a person establishing an estate plan lacked legal capacity to do so.
- **Accountings:** Stoll Berne has helped clients compel trustees and other beneficiaries to provide documentation and information regarding use of assets and investment strategies.

In addition, family and closely held business disputes often involve claims relating to estate planning and obligations of fiduciaries. Stoll Berne has helped closely held businesses of all sizes deal with complex estate planning structures that have impaired our clients' wishes to terminate business relationship, enter into business transactions, and unwind contentious relationships.

## Trust & Estate Litigation Attorneys



**Gary Berne**  
Attorney & Founder



**Joshua Ross**  
Attorney



**Jen Wagner**  
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