

ESTATE, TRUSTS, PROBATE & LITIGATION PRACTICE

ESTATE PLANNING & ADMINISTRATION

Estate planning is an area of law designed to bring security and comfort to you and your loved ones. Planning your estate can also help to preserve hard-earned family wealth. Our estate planning and administration services are dedicated to relieving stress, eliminating uncertainty and protecting your family's assets. Valerie has extensive experience preparing comprehensive estate plans, giving families a sense of security and preserving their assets for future generations, minimizing estate taxes, preparing for family emergencies, and avoiding the expense and nightmare of probate.

Our estate planning expertise is comprehensive and includes the following services:

Revocable Living Trusts
Wills
Irrevocable Trusts
Financial Powers of Attorney
Advance Healthcare Directives
Special Needs Trusts
Qualified Domestic Trusts (QDOTs)
Family Limited Partnerships
Charitable Trusts
Gifting Strategies

In addition to the estate planning activities involved in drafting a trust instrument, Valerie also represent trustees and beneficiaries in administration of trusts so that the intentions of the trust are carried out seamlessly and efficiently. Valerie's practice includes petitioning for transfer of assets into the trust after the death of the trustor in the event title was incorrectly cleared, funding sub-trusts, petitioning for instructions regarding the interpretation or modification of trusts, monitoring the creditors' claim process, petitioning for instructions regarding actions to be taken by the trustee, petitioning for termination of trusts, and petitioning for resignation of trustees and for the appointment of successor trustees.

Valerie also advise trustees regarding their fiduciary duties and powers, the sale or distribution of trust assets, and the preparation of accountings and reports.

TRUST & ESTATES LITIGATION

When a trustee is accused of not fulfilling his or her fiduciary duties, the matter can become contested. Valerie represents trustees and beneficiaries in estate and trust disputes and litigation.

SBE's Attorneys have in-depth knowledge of the legal responsibilities of trustees. More specifically, the firm's estate and trust litigation group has extensive expertise in:

Will and trust contests;
Estate and trust accountings;
Removal of trustees;
Defense of trustees;
Trustee/Beneficiary disputes;
Trustee/Trustee disputes;
Family disputes;
Modification of trusts;
Termination of trusts;
Property disputes;
Tax disputes;
Creditor claims;
Contested conservatorships, and
Other disputes involving wills and trusts.

If you think you may need legal help or advice for a trust, estate, probate, will contest, wills and trust fraud, or any other trust or estate litigation matter, Valerie can help.

© 2012, Valerie A. Powers Smith, Esq., Of Counsel, Slovak Baron Empey Murphy & Pinkney, LLP, has offices in both Palm Springs, California, and Princeton, New Jersey. Valerie's experience in the field of estate and trust planning & administration includes the creation of wills, durable powers of attorney, medical/advance directives, special needs trusts, revocable living trusts, and credit shelter trusts. Valerie's practice includes an additional focus in the area of special needs and disability law. Valerie has routinely advised families, executors, and corporate trustees on the areas of estate and trusts planning and administration; as well as, individuals and families with special needs or unique issues. She is an active member of the Real Property, Trusts & Estate Law Section of the American Bar Association; as well as the state bar associations in California, New Jersey, New York, and Pennsylvania. Valerie has written numerous articles for professional journals and has spoken extensively. She is highly regarded for her estate planning and administration and trust work with particular regard to those with complex, specialized, and unique considerations. *For more information or to contact Valerie, email her at powers@sbemp.com or call (760) 322-2275 x20 or (609) 955-33*