

Probate, Trust and Guardianship

Overview

The Firm actively assists its clients with probate, trust and estate administration and settlement (including preparation and filing of federal and state estate tax), guardianship matters, and litigation relating to these areas.

Firm lawyers routinely represent executors, administrators, and trustees in all aspects of estate and trust administration and settlement including seeking appointment, carrying out his or her duties, preparing death tax returns, and matters relating to the settlement of the estate and trust, and also represents beneficiaries relating to their interest in estates and trusts. In addition, Firm lawyers represent creditors of estates in matters relating to their enforcement of their claims.

In guardianship matters, the Firm is often engaged to assist in seeking or defending against a guardianship. The Firm routinely represents court appointed guardians in all aspects of guardianship proceedings including preparing inventories and accountings.

Various members of this section are often appointed by the courts to serve as a temporary guardian, temporary administrator, attorney ad litem, guardian ad litem, mediator and in other capacities relating to estates, trusts and guardianships.

Members of this section of the Firm have advanced degrees, and speak to professional and lay organizations concerning probate, trust and guardianship matters.

The Firm's attorneys are frequently requested to lecture on issues related to probate, trust and guardianship matters at numerous continuing legal education seminars of the State Bar of Texas and other state and local legal organizations. Sarah Patel Pacheco is a co-author of the Texas Probate Practice Guide published by West Publishing. Sarah Patel Pacheco is the co-author of Wills, Trusts & Estate Planning published by West Publishing. Darlene Payne Smith is the author of the Probate Claims Section of the Texas Collection Manual.