



## ESTATE PLANNING, WILLS, TRUSTS & PROBATE

Helping clients accomplish sound financial arrangements through a carefully drafted estate plan is the goal of our Texas estate planning lawyers. Effective estate planning requires careful attention to the needs and long-term goals of each client.

We also offer our in-depth understanding of the tax consequences of various financial transactions and exhaustive knowledge of the probate process. Whether the client requires a simple will or a complex plan to gradually distribute assets, our estate planning lawyers can help.

### About Our Services

We provide a full range of legal services surrounding estate planning, including:

- Federal and state death tax planning
- Wealth transfer planning, including for high net worth families
- Gift and joint ownership planning
- Business transition planning
- Asset protection and estate tax reduction
- Living trusts, wills, durable powers of attorney
- Insurance trusts
- Trusts for minors and persons with special needs
- Charitable gift planning and charitable trusts
- Marital property agreements (Pre-nuptial and marital agreements)

### Estate Administration for Texas

We also have extensive experience in advising individual fiduciaries as well as trust departments of national and state banks. We advise these groups on ensuring compliance with federal and state laws and regulations governing the administration of estates and trusts.

Our estate planning and probate lawyers provide a full range of estate administration services to clients, including:

- Preparing court documents required for the probate of the will and the appointment of personal representatives
- Preparing inventories of estate assets and liabilities, as well as notices and other related documents required by the court

### RELATED CAPABILITIES

- Corporate
- Elder Law
- Family Law
- Guardianship
- Litigation
- Tax Controversies
- Tax Planning

### PROFESSIONALS

- Jeffrey A. Armstrong
- Cash Barker
- Cara M. Chase
- Wesley J. Filer
- Keith E. Gamel
- James T. Howard
- Kaitlin H. Kerr
- Kyle G. Knas
- Krizia Landivar
- Kristen A. Mynar
- Shane O'Dell
- Ben Selman
- Laura R. Swann
- Thomas D. Swann
- Franklin L. Tuttle Jr.
- Randee Williams Koeller

## Estate Planning, Wills, Trusts & Probate

- Reviewing and analyzing possible income and estate tax planning options
- Preparing required court accountings
- Counseling executors and trustees regarding their fiduciary duties
- Assisting with the marshalling of assets and payment of debts
- Assisting with the transfer of assets to the beneficiaries and the winding up of the estate
- Assisting with the funding of trusts created upon death or with the winding up of trusts that terminate on death
- Preparing and filing federal estate and Texas inheritance tax returns
- Defending the executor in will contests and in fiduciary litigation matters
- Representing estate beneficiaries in will contests and in fiduciary litigation matters

### News

**28** \ MARCH \ 2022

Mark Altman, Kristen Mynar, and Krizia Landivar Recognized as Texas Rising Stars 2022

**18** \ JUNE \ 2021

Naman Howell Lawyer Kyle G. Knas Nominated for Waco Under 40

**31** \ JULY \ 2020

Naman Howell Lawyer Kristen A. Mynar Nominated for Waco Under 40

**25** \ MARCH \ 2019

Naman Howell Lawyers Joe Rivera and Kyle Knas Published in Today's CPA