

Practices

Probate and Fiduciary Litigation

Studies estimate that roughly 70 percent of families lose substantial portions of their inherited wealth, mostly due to estate battles. Family dynamics, inadequate planning, and the evolution of blended families are common causes of probate, trust, and guardianship litigation. Estate-related disputes require legal counsel who can advocate in a variety of courts and tribunals, and tackle the sophisticated and often complex financial and tax issues, while navigating sensitive family dynamics. Our team combines these skills to achieve just and equitable outcomes in a caring, efficient, and effective manner.

Akerman provides individuals, families, and fiduciaries with the comprehensive knowledge and experience necessary to resolve complex probate, trusts and estates, and guardianship disputes through litigation, mediation, and arbitration. Our team includes members of the American College of Trust and Estate Counsel and the American College of Tax Counsel, as well as Certified Mediators with decades of experience in high profile, high conflict, and complex cases. Litigating in state and federal courts, including local probate and tax courts, throughout the United States, we have resolved matters through trial and verdict as well as achieving successful settlements.

Our team is highly experienced in defending income, estate and gift tax audits, appeals, and litigation before government agencies. We represent clients in court in all matters involving contested interests and in IRS administrative proceedings over the determination or assessment of taxes, and the

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Our Team

Related Work

Litigation
Tax
Trusts and Estates

valuation of special assets, including real estate, art, intellectual property interests, and sports franchises.

What We Do

- Will and trust contests
- Estate tax litigation
- Breach of fiduciary claims – defense and prosecution
- Fiduciary risk management
- Accounting litigation
- Fiduciary surcharge and removal litigation
- Trust accountings
- Guardianship litigation and incapacity proceedings
- Trust modification, reformation, and termination
- Will and trust construction proceedings