

Estate & Trust Administration

When you call us, you'll be answered by our welcoming receptionist who will direct your call to the lead paralegal for estate and trust administration matters who will begin the client intake process. They will answer any preliminary questions you have, schedule the initial meeting, and gather all necessary information, including any documentation that your attorney will need prior to your initial in-person meeting.

Our team will immediately get to work carefully reviewing your documents. A thorough review of all your documents is key. Our goal is to have as much information as possible prior to the initial meeting to ensure that it is as productive as possible.

In your first meeting, we will walk through the estate and/or trust administration process. We understand that we are meeting with you immediately following the passing of a loved one and that legal matters may be the last thing on your mind. We want you to feel comfortable with us, and also with the process.

When leaving this initial meeting, both the client and attorney will have their action steps outlined. A summary letter will accompany the retainer letter to provide a handy reference for matters discussed at the meeting.

Every estate or trust is different, but the administration process typically lasts 9 months to a year, at a minimum.

For estate administration, we typically are paid after the estate administration process at the higher of our hourly rates or one-half of the allowable personal representative commission. For some estates, if paid monthly by the client, we bill on an hourly basis. Also, for most trust administration matters, we bill on an hourly basis.



We pride ourselves on being team players and not overstepping our areas of practice. We enjoy close working relationships with other professionals and if you have a matter that we are not comfortable handling, we will let you know and refer you to someone we know can best handle your needs.