



# THE WAGNER LAW GROUP

## Trusts & Estates

### Our Expertise

The Wagner Law Group maintains an active trusts & estates practice group which recognizes that creating estate plans can be very personal and sometimes stressful endeavors for clients and their families. Each individual situation receives careful attention, designed to provide customized, thoughtful advice.

Our trusts & estates attorneys assist families in protecting assets, managing wealth, and transmitting wealth to future generations based on the particular client's situation. We work to ensure that the objectives of our clients are met, not only for the immediate benefits, but also in terms of long-range planning.

In representing individuals and families, we serve as legal advisers and sometimes also as personal representatives and trustee.

### Our services include:

- Comprehensive estate planning, including marital trusts, wills, durable powers of attorney, health care proxies, living wills and HIPAA releases
- A variety of complex trusts, such as irrevocable life insurance trusts, qualified domestic order trusts, and children's trusts
- Legal advice to fiduciaries, including trustees, personal representatives, guardians and conservators
- Guardianships and conservatorships
- Probate administration
- Post-mortem planning
- Probate litigation, including will contests and petitions to partition real estate.

### Representative cases include:

- Preparation of a notice of substitution - facilitated by a stock swap resulting in a better tax result for a \$5 million trust
- Preparation of a partial disclaimer – providing heirs with additional property in an \$8 million trust
- Funding a trust in 2015 with assets from a 1965 trust – through the exercise of a power of appointment



Super Lawyers



- Preparation of a blended marriage estate plan, using a complex technique for addressing the needs of children from different marriages for trusts with assets of \$6 million
- As trustee, implementing the terms of a pre-marital agreement in a marital and family trust – assuring that there would be adequate income for the surviving spouse
- Filing a petition to partition jointly held real estate - requiring the sale of the property.

## Press and Announcements

- [The Wagner Law Group Expands its Trusts and Estates Practice in Florida and Missouri](#)

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