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Estate Planning and Probate

Sheehan Phinney Estate Planning and Probate Practice Group serves individuals of all ages and their families.

Throughout its history, the firm has been involved in helping individuals and families plan for their futures and their financial security. Through thoughtful estate planning, we help clients make decisions which can be implemented in the event of death to take care of those who survive, or to manage their assets if either disability occurs or long-term care is required, and to minimize taxes to the extent legally possible.

The members of our group ensure that assets are held in the proper way, establishing trusts when indicated to provide asset management and personal care, while avoiding probate. Our attorneys also assist families with the administration of trusts and estates after death. Our understanding of the difficult decisions today's medical advances place before families during times of advanced illnesses or catastrophic injury led our attorneys to help draft the advance directive laws which resulted in living wills and health care directives. We carefully explain the use, and importance of executing, these documents during the estate planning process.

Our knowledgeable paralegals help family members and fiduciaries maneuver through the maze of tax and probate procedures involved in settling estates efficiently. Working with financial planners, investment professionals and advisors, and institutional executors and trustees, our attorneys and paralegals make certain that the professionals advising our clients work together in the client's best interest.

As part of the planning process, the Estate Planning and Probate Practice Group regularly assists individual clients and charitable institutions with planned giving services which enables individuals to assist good causes in a way that benefits both the charity and the individual from a personal and tax perspective.

One of the most stressful issues facing an aging population is planning for long-term care. Our attorneys frequently counsel families about long-term care insurance, Medicare and Medicaid programs, and other associated issues, and help them understand the contracts for care presented by various providers of such services. As in all such matters, our attorneys and paralegals treat these matters with sensitivity and discretion.

Attorneys from the Practice Group regularly address groups and present educational seminars on current estate planning topics, taxes, and related issues. They also testify before the legislature as new laws and regulations are proposed which affect these legal issues.

To plan an estate, review prior estate planning, discuss the probate process or get answers on any of these sensitive matters, contact any of our estate planning or probate attorneys listed. Whether your needs are straightforward or complex, we welcome the opportunity to put our understanding of the many facets of estate planning to work for you.