

Services & Industries

Trusts and Estates

OVERVIEW

With one of the largest and most sophisticated trusts and estates practices in the country, Day Pitney's Trusts and Estates practice group provides the full range of services needed by individuals and their families as well as fiduciaries. The breadth and scope of our services to individuals and families are among the most comprehensive in the country. These services include estate and transfer tax planning, business succession planning, administration of decedents' estates, administration of trusts and guardianships, conservatorships, and other matters relating to incapacity.

Day Pitney trusts and estates attorneys have extensive experience helping generations of families plan for the future. They provide clients with sophisticated domestic and international estate planning and estate settlement techniques to protect clients' assets during their lifetimes as well as to ensure that their property passes according to their wishes. As the most populous generation continues to age, the Day Pitney T&E attorneys stay abreast of all trusts and estates issues as these issues are being identified, redefined and challenged.

THE DAY PITNEY DIFFERENCE

Many large law firms have private client practices that function mainly as a service practice. Their depth of experience is limited. Day Pitney has more than 70 lawyers who assist individuals and families with trusts and estates matters full time. Our lawyers are supported by a staff of more than 30 trusts and estates paralegals. Together, we have literally hundreds of years of experience advising individuals and their families, as well as individual and professional fiduciaries, with respect to the full range of trusts and estates matters.

Just as significantly, the lawyers in our Trusts and Estates practice group consider themselves part of a team that collaborates to produce the best, most practical results for our clients. Our lawyers regularly consult with one another to take advantage of our collective experience to provide the benefits of the group's knowledge to address any particular situation. The partners and counsel in our group have been practicing in our field for an average of more than 20 years. When clients consult with a Day Pitney trusts and estates lawyer, they receive the benefit of not only that lawyer's knowledge and experience but also the benefit of a collective group effort over many years to provide cutting-edge yet practical and results-oriented solutions to legal issues.

The Day Pitney Trusts and Estates practice group is also different in that it works in collaboration with all the firm's lawyers to provide whatever services are needed for our clients. For example, our

corporate, employment, real estate, trial and environmental lawyers regularly provide advice with respect to legal issues relating to our clients and their business interests. When a client retains Day Pitney to advise on a matter encompassed by our practice, they can be assured that all the resources of the firm will be available to provide whatever assistance is needed for issues that arise in the current engagement or in the future.

Related practice groups include Special Needs Planning, Fiduciary and Probate Litigation, Tax-Exempt Organizations and Charitable Giving, and International Trusts and Estates.

The Day Pitney Trusts and Estates and Family Offices practices and attorneys have been recognized locally and nationally. The firm and 20 attorneys were ranked in the *2022 Chambers High Net Worth (HNW) Guide*,* a Chambers and Partners publication specifically aimed at the international private wealth market. Day Pitney also was selected as the *2022 U.S. News & World Report and Best Lawyers® "Law Firm of the Year,"* for Trusts & Estates Law, and the "Best Law Firm – Estates and Trusts" at the Private Asset Management Awards in 2020. In addition, 15 attorneys are elected fellows of the American College of Trust and Estate Counsel (ACTEC), a group of peer-elected trusts and estates attorneys across the United States and abroad with more than 10 years of experience in the active practice of probate and trust law or estate planning.

** No aspect of these advertisements has been approved by the highest court of any state.*

RECOGNITION*

Named "Best Law Firm – Estates and Trusts" by *Private Asset Management*, 2024



Named "Law Firm of the Year," in the "Best Law Firms" Trusts and Estates Law category by *U.S. News & World Report and Best Lawyers®*, 2021

Named a Finalist for "Legal Team of the Year," by *Family Wealth Report*, 2021

Shortlisted for "Best Law Firm - Estates and Trusts" by *Private Asset Management Awards*, 2021

Shortlisted for "USA Private Client Team of the Year – East Coast," by *Chambers HNW* (Chambers & Partners), 2020

Chambers Shortlisted High Net Worth Awards

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Named "Best Law Firm – Estates and Trusts" by *Private Asset Management*, 2020

2020 PAM Award

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Shortlisted for "Legal Team of the Year," by *Family Wealth Report*, 2019

Family Wealth Report Awards 2019 Shortlisted

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Named "Law Firm of the Year" by *Family Wealth Report*, 2017

Winner Family Wealth Report Awards 2017

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Finalist in "Accounting, CPA or Law Firms Serving Family Offices" category for Family Wealth Alliance Best in the Industry Awards, 2018

The Family Wealth Alliance

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Shortlisted in two categories, "Best Private Client Law Firm" and "Best Trusts and Estates Division," by Private Asset Management (PAM), 2018

Private Asset Management Awards 2018 Shortlisted

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Shortlisted in two categories, "Legal Team of the Year" and "Family Wealth Counseling," by *Family Wealth Report*, 2018

Family Wealth Report New York Awards 2018 Shortlisted

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Named a Family Office "Industry Awards" Finalist by *Wealth Management*

WealthManagement.com 2017

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Ranked as "Highly Commended" in categories for "Best Private Client Law Firm" by Private Asset Management (PAM), 2017, 2019

Private Asset Management Awards - Highly Commended - 2017

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Shortlisted for "Law Firm of the Year" by *Family Wealth Report*, 2016

Shortlisted Family Wealth Report 2016

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Ranked Nationwide, and Band 1 in Private Wealth Law, CT and MA, by *Chambers HNW* (Chambers & Partners), 2016-2020

Ranked Band 1 in Wealth Management, Nationwide, by *Chambers USA* (Chambers & Partners), 2010-2016

Chambers USA 2016

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**No aspect of these advertisements has been approved by the Supreme Court of New Jersey. See [Awards Methodology](#).*

AFFILIATIONS

Family Office Association, Resource Council Member

[Family Office Association Member](#)

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INSIGHTS

Message from the Section Chair

January 25, 2024

Day Pitney Private Client Partner Michael S. Schwartz authored the introduction to the Winter issue of the New York State Bar Association's *Trusts and Estates Law Section Journal*.

"Planning for Persons with Disabilities: Special Needs Trusts and Other Considerations," New England Village

January 24, 2024

Earlier this week, Boston Attorneys Meredith Greene and Kaitlyn Sapp met with the Family Association of New England Village, a Massachusetts non-profit that serves adults with intellectual and developmental disabilities, to present their expertise regarding Special Needs Planning.

"Trust & Estates Mid-Year Review", Boston Bar Association Virtual Webinar

January 17, 2024

Boston Attorney Susan A. Robb, Counsel in the Private Client Department, presented at the Boston Bar Association's Trust & Estates Mid-Year Review on January 17.

The Importance of Flexibility to the Trusts and Estates Attorney

January 12, 2024

Day Pitney Private Client Partner Michael S. Schwartz authored the article "The Importance of Flexibility to the Trusts and Estates Attorney" in the *New York Law Journal*.

"Planning for and Addressing Changed Circumstances," New York State Bar Association's Trust and Estates Law Section

January 17, 2024

New York Partner Michael S. Schwartz will be speaking at the Annual Meeting of the New York State Bar Association during the Trusts and Estates Law Section on January 17, and will be given an honor for his work as chair of the section in 2023.

NEWS

Day Pitney Named Finalist in Three Categories for Family Wealth Report Awards

February 20, 2024

Day Pitney Press Release

Day Pitney Secures "Best Law Firm – Estates and Trusts" Award at the Private Asset Management (PAM) Awards 2024

February 13, 2024

Day Pitney Press Release

Practical Considerations in Dealing with Incapacity

February 12, 2024

Day Pitney Trusts and Estates Attorney Keith Bradoc Gallant was featured on the American College of Trust and Estate Counsel's (ACTEC) Trust and Estate Talk podcast episode "Practical Considerations in Dealing with Incapacity."

People on the Move

February 5, 2024

The promotion of A. Michael Wargon to partner was featured in *The Palm Beach Post's* People on the Move column.

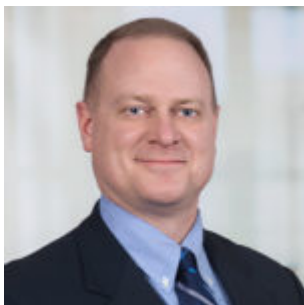
Three Day Pitney Partners Named by Daily Business Review as 2024 Florida Legal Awards

Honorees

February 2, 2024

Day Pitney is proud to announce that three of the firm's South Florida-based partners have been recognized for the Florida Legal Awards from the *Daily Business Review*.

CONTACTS



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