

Brought suit on behalf of a successor trustee

Individual Beneficiary v. Individual Trustee and former counsel advising the trustee. We brought suit on behalf of a successor trustee to remove the current trustee and fund trusts which were to have been funded upon the decedent's death – three years prior. After successfully removing the initial trustee, we addressed a variety of issues arising from her negligence, including federal and state tax issues, marshalling assets, environmental compliance, recovery and sale of multiple business enterprises, and ultimately funding of the trusts. Suits for damages were filed against both the former trustee and her counsel, both of which settled.

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