



WILLS, TRUSTS AND ESTATES

Conner & Winters attorneys are experienced in all aspects of estate planning and the administration of trusts and estates. We advise clients on estate planning, preparation of wills and trusts, durable powers of attorney and advance directives for health care, charitable planning, federal and state estate, gift and income taxation, probate, and trust administration, and personal and family asset planning. In addition, we work with succession planning with closely-held corporations owned by our clients and their families.

Our attorneys are recognized authorities in many areas, including complex estate planning, tax, legal aspects of distributions from qualified plans and IRAs, private family and public foundations. We have created revocable trusts, family partnerships and limited liability companies, charitable remainder trusts, charitable lead trusts, qualified plan beneficiary designation arrangements and many other planning vehicles.

We provide counsel and assistance on matters such as:

- Planning and preparation of complex wills and trusts for all ages, including older generation family members
- Probate and administration of wills and trusts
- Irrevocable trusts and educational trusts funded by parents and grandparents for the benefit of younger family members
- Guardianship matters for minors and incapacitated adults
- Life insurance planning with trusts and financing options for life insurance
- Transfers of closely-held family companies to children and grandchildren
- Lifetime gifting using limited liability companies and other sophisticated techniques such as GRATS, QPRTS, CRUTS and CLATS

ATTORNEYS

Michael Albright
Courtney Coretz
Katherine G. Coyle
William E. Foster
Allison McGrath Gardner
John W. Ingraham
David J. Looby
Matthew Peace
Alexander Shell
Beverly K. Smith
Preston Sullivan

RELATED PRACTICES

Alternative Dispute Resolution
Banking and Finance
Bankruptcy and Business Reorganization
Employee Benefits
Health Care
Income Tax
Insurance Coverage, Claims Representation and Risk Management Counseling

Wills, Trusts and Estates

- Family dispute resolution in estates
- Pre-nuptial agreements
- Representing fiduciaries and beneficiaries with regard to the administration of trusts and estates

Litigation
Real Estate
Tax-Exempt
Organizations

Our attorneys in this practice group routinely rely on Conner & Winters' other seasoned attorneys to assist our estate planning clients, including in such areas as banking and finance, bankruptcy and business reorganization, church and nonprofit organizations benefit planning, alternative dispute resolution, employee benefits, health care, litigation, insurance and risk management counseling, real estate, income tax, and tax-exempt organizations.

News

Preston Sullivan Selected to Conner & Winters Partnership
01.10.2025

30th Edition of Best Lawyers® Recognizes 67 Attorneys from Conner & Winters
08.18.2023