SHULMAN
ROGERS

Wills, Trusts, Estates and Probate

When it comes to estate planning, the stakes are personal. You're deciding how to protect what you've built, provide for the people you love, and make sure your wishes are honored. That deserves attorneys who bring both technical depth and genuine care to every conversation.

Our Wills, Trusts, Estates, and Probate team represents individuals, families, entrepreneurs, and executives throughout Maryland, Virginia, and the District of Columbia. We design estate plans that are built to last, flexible enough to adapt to changing family circumstances, shifting tax laws, and the unexpected turns life takes. And we stay engaged over time, helping clients implement and update their plans as their lives evolve.

Estate Planning

A sound estate plan is more than a set of documents. It is a coordinated strategy for transferring wealth, minimizing taxes, and ensuring your wishes are carried out. We work with clients to draft and implement the essential documents, including wills, revocable trusts, financial powers of attorney, healthcare powers of attorney, and living wills, while also designing broader plans that address the full picture.

For clients with more complex needs, we draw on a full range of sophisticated planning strategies, including:

- Charitable lead trusts and charitable remainder trusts
- Dynasty trusts and insurance trusts
- Grantor retained annuity trusts (GRATs)
- Qualified personal residence trusts (QPRTs)
- Family limited partnerships and limited liability companies

We also work closely with clients' other advisors, including financial planners, accountants, investment advisors, and insurance agents, to make sure the estate plan fits seamlessly within the client's broader financial framework.

Estate Administration

Losing a loved one is hard enough without the added weight of navigating probate and estate administration alone. We help families manage the process with care and efficiency, handling probate court filings and proceedings, asset distribution, and the preparation and filing of estate and gift tax returns at both the state and federal level. We approach the personal and family dynamics that often surface during this process with sensitivity and professionalism.

Trust Administration

We are available to serve as professional trustees and executors for clients who want experienced, independent oversight of trust administration. Every engagement receives individualized attention.

Charitable Giving and Philanthropy

For clients whose plans include a philanthropic dimension, we provide guidance on the tax and legal implications of charitable giving and assist with establishing the right vehicle, whether a public charity, private foundation, or charitable trust. We also counsel existing organizations on formation, fiduciary responsibilities, and ongoing compliance.
