

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



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



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



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



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



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



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



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



2017 Executive Forum and Industry Awards

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



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



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



**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



INSIGHTS

New York Partner, Dina Kapur Sanna Co-Chair of International Trusts & Estates Webinar Using Trusts and Alternative Vehicles for Inbound Investments

April 4, 2024

On April 4, Trusts and Estates Partner Dina Kapur Sanna co-chaired an American Law Institute Continuing Legal Education webinar on Using Trusts and Alternative Vehicles for Inbound Investments.

Insights Into Florida Trust and Estate Litigation Trends

April 3, 2024

Day Pitney Litigation Partner Mark Romance and Trusts and Estates Partner Melissa Rodriguez authored the article "Insights Into Florida Trust and Estate Litigation Trends," for *Daily Business Review*.

"2024 Family Wealth Advisors Interchange," Raymond James

March 21, 2024

Day Pitney Corporate department chair R. Scott Beach and Boca Raton Trusts and Estates Partner Jim Ballerano presented at the "2024 Family Wealth Advisors Interchange," sponsored by Raymond James on March 21 in St. Petersburg, Florida.

"Trusts and Estate Planning 101," Society of Neurological Surgeons

March 16, 2024

Kaitlyn (Katie) Sapp spoke to The Society of Neurological Surgeons regarding Trust and Estate Planning 101 on March 16.

Proceed with Caution: Shifting Beneficial Interests in a Trust May Trigger Gifts

March 19, 2024

New Jersey Trusts and Estates Senior Associate Daniela P. Catrocho authored "Proceed with Caution: Shifting Beneficial Interests in a Trust May Trigger Gifts," for the *New Jersey Law Journal*.

NEWS

Day Pitney Secures Solutions for International Americans Award at the Family Wealth Report Awards 2024

May 6, 2024

Day Pitney Press Release

The Boston Marathon: Philanthropy, a Dare, and a Fellini

April 26, 2024

Day Pitney Fiduciary and Probate Litigation Partner Ann Hetherwick "Hether" Cahill was featured in *Super Lawyers Magazine* article "The Boston Marathon: Philanthropy, a Dare, and a Fellini."

Day Pitney's Tasha Dickinson Recognized With a Prestigious Women Award

April 24, 2024

Day Pitney Trusts and Estates Partner Tasha K. Dickinson has been named to *South Florida Business & Wealth's* 2024 Prestigious Women Awards list.

Day Pitney Partners Recognized by Providence Business News with Two 2024 Business Women Awards

April 16, 2024

Day Pitney Press Release

Day Pitney Announces New Leadership Appointments

April 8, 2024

Day Pitney's Executive Committee, Executive Board and department leadership changes were featured on *CityBiz*.

CONTACTS



B. Dane Dudley
West Hartford, CT
bddudley@daypitney.com
T: (860) 313 5752