



CERTILMAN BALIN
ATTORNEYS

**Wills, Trusts & Tax Planning
Probate and Estate Administration**

The attorneys in our Wills, Trusts & Tax Planning/ Probate and Estate Administration Group provide comprehensive counsel across all facets of estate planning, probate and estate administration, and litigation arising from trust and estate disputes.

In the area of estate planning, our primary goal is to help clients preserve and transfer wealth effectively, in accordance with their personal and family objectives. We develop customized estate plans for a wide range of clients, including real estate investors, business owners, and professionals.

Our services include the preparation of wills designed to minimize estate tax exposure, as well as the implementation of sophisticated planning tools such as revocable trusts, insurance trusts, qualified personal residence trusts (QPRTs), grantor retained annuity trusts (GRATs), charitable trusts, generation-skipping trusts (GSTs), spousal lifetime access trusts (SLATs), and asset protection trusts. We also provide strategic guidance on IRA and qualified plan distribution planning as part of comprehensive retirement planning.

Our probate and administration services support fiduciaries through every stage of the estate settlement process, from court proceedings, asset collection and valuation, to final distribution. We prepare estate and gift tax returns, represent clients in IRS and state audits, and, when appropriate, serve as executor or trustee.

Our litigation practice encompasses a broad range of trust and estate disputes, including will contests, trust challenges, contested fiduciary accountings, business valuation issues, real estate partition actions, and guardianship proceedings.



Above all, we recognize the deeply personal nature of this work. Whether assisting with the drafting of a simple will, creating a complex wealth transfer strategy, or managing a contested estate matter, we are committed to delivering solutions that align with our clients' values and long-term goals.

The Firm

Serving the Long Island community since 1965, our firm has developed 18 areas of practice to meet our clients' legal needs. Clients may rely upon counsel from one practice area, or when necessary, a team of lawyers from different practice areas.

Certilman Balin takes an interdisciplinary approach to protect the interests of our clients, with an eye on avoiding unwarranted fees from excessive legal actions.

- Banking/Commercial Lending
- Bankruptcy & Debtor/Creditor Rights
- Condominium, Cooperative & HOA
- Corporate/Securities
- Criminal Law
- Elder Law
- Environmental Law
- Labor Relations & Employment Law
- Land Use & Zoning
- Lending Services
- Litigation
- Mediation
- Nonprofit/Tax Exempt/Religious Organizations Law
- Real Estate Law
- Real Property Tax Certiorari & Condemnation
- Telecommunications
- Trust & Estate Litigation
- Wills, Trusts & Tax Planning/Probate & Estate Administration



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