

Paley Rothman Hosts Estate & Trust Administration Paralegals Lunch

Paley Rothman was pleased to host a group of estate and trust administration paralegals from a handful of Montgomery County law firms on Wednesday, January 11, 2017.

Paralegals from Paley Rothman, Lerch, Early & Brewer, Pasternak & Fidis, Selzer Gurvitch, Shulman Rogers, Stein Sperling, and West & Feinberg participated in a lively discussion over lunch, covering Maryland small estate attorney fee issues and Information Report filings, District of Columbia filings for small estate administration vs. regular estate administration, D.C. estate tax exemption and the new D.C. estate tax return, Trust Code filings in all three jurisdictions, issues with multiple fiduciaries, the new IRS Form 8971 (basis statement filings), and requests for IRS closing letters.

We look forward to hosting the next Paralegal Power Lunch on March 8, 2017. If you are an estate or trust administration paralegal interested in attending, please contact Kathy Hynson at kbh@paleyrothman.com.

