

Represented the Beneficiaries of a Trust in a Dispute Against the Trustee

Amundsen Davis represented the beneficiaries of a trust in a dispute against the trustee. The trustee was not providing required statutory documents, was opaque, and would not commit to a distribution of the trust assets. The trust protector was also unresponsive, and serving as trustee counsel in a clear conflict of interest. Upon the beneficiaries engaging Amundsen Davis, we immediately obtained an agreement for the trust protector to resign, and negotiated a settlement agreement where over seven-figures of assets were distributed by a date certain.

PROFESSIONALS

Joe Demko
Partner

Daniel S. Peters
Partner

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