

Administration Of Trusts and Wills

By Richard H. Lambie

It takes a village to care for the people in the senior population and people with disabilities. No one can do this on their own.

People often have an attorney involved, and an accountant, but as they age, there are a number of other people that should get involved. One example would be a care manager to help with placement and medical decisions.

My office has significant experience dealing with teams that take care of trust management, and taking care of individuals during their declining years. We are able to coordinate all of the services necessary.

For a lot of people, they have avoided dealing with attorneys and CPAs during their lifetime. They may have a trusted investment manager in place, but it can get overwhelming very quickly.

My office is able to coordinate all of the services needed. We have attorneys, CPAs, and investment managers that we deal with, but we are always open to dealing with additional professionals. In each particular case, everyone is specialized. We do not have a cookie-cutter approach to how we manage our trusts.

My office can set up a team for you, or work with your existing team to make sure that the best possible outcomes are obtained as we go through the management of your trust, and ensure that your wishes are given full effect as you go through the remainder of your life.

Beneficiaries can be added at any point, and their wishes and entitlements properly preserved.

Richard H. Lambie

www.rhlambie.com

408.551.2122

