

Fiduciary Litigation

Cozen O'Connor's team of Fiduciary Litigation attorneys offers both domestic and international acumen in representing and protecting the interests of individuals and families and corporate entities, including banks and trust companies. With over 925 attorneys in 33 offices across two continents, Cozen O'Connor provides the highest quality counsel and representation in sophisticated matters pertaining to all aspects of fiduciary responsibilities and conflicts.

WHAT WE DO

Our fiduciary litigation group represents clients in negotiations, settlements, and trials on all matters pertaining to the proper administration of estates, trusts, powers of attorneys, guardianships, health care decisions, and assets. We provide advice for both big-picture and day-to-day administration, including:

- Will, estate, trust, guardianship, power of attorney, health care decision, and incapacity contests
- Validity and interpretation of wills and trusts
- Undue influence claims
- Breaches of fiduciary duty and trustee removal and surcharge actions
- Fiduciary duty issues for corporations, partnerships, trusts, professionals, and other entities and individuals
- Charitable trust administration and disputes
- Pre-dispute resolution on all matters
- Petition for instructions, reformations, and modifications of existing trusts

WHY OUR FIRM

International Reach and Resources, Deep Local Roots

Individuals, families, and businesses have complex planning and representation needs. Our Fiduciary Litigation Group offers **sophisticated, comprehensive services for our clients**, including providing counsel on compliance and responsible administration of fiduciary duties. When litigation is necessary, our tenacity, creativity, and attention to detail are second to none.

Thanks to Cozen O'Connor's rare combination of experience across practice areas related to fiduciary litigation and our deep bench of **seasoned attorneys throughout North America**, individual and corporate clients alike can be assured that all aspects of protecting their assets and concerns are addressed directly by veteran attorneys with decades of relevant legal experience. No matter how complex the matter at hand, our firm provides the deft representation our clients need and deserve.

Fiduciary responsibilities are part of an ongoing relationship that continues long after the ink is dry on paperwork. Cozen O'Connor helps ensure our clients' success by advising on best practices for compliance, working to swiftly resolve disputes, and pursuing legal and financial remedies as needed.

Experience

Successfully defended co-trustees of a family trust facing removal and breach of fiduciary duty claims.

Successfully defended a foreign wealth advisor facing multimillion-dollar breach of fiduciary duty claims.

Successfully represented a professional trustee in a \$60 million charitable trust dispute.



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Related Practice Areas

- Corporate
- Family Law
- Private Client, Trusts and Estates
- Real Estate

Obtained a multimillion-dollar settlement for family members of a decedent asserting undue influence claims.

Successfully represented a trustee and executrix in multiple accountings involving in excess of \$50 million.

Successfully represented a trustee of a group of nine related trusts with total assets exceeding \$350 million in litigation brought by multiple beneficiaries against the settlor and other trustees alleging inappropriate investments and self-dealing.

Won summary judgment for four former members of the board of a pension fund against claims alleging a \$75 million RICO conspiracy.

Convinced the Orphans' Court to reject a beneficiary's claim that our client, a bank, should be removed as the Trustee of a trust with tens of millions of dollars of assets.
