

A man wearing a dark cowboy hat and a light purple long-sleeved shirt is crouching in a field, holding a small black and white speckled dog. To his left is the head and neck of a brown horse with a leather bridle. The background shows a vast, open landscape with dry grass and distant trees under a clear sky.

PROTECTING FAMILIES & ESTATE ASSETS

ESTATE PLANNING
& ADMINISTRATION



BROWNING KALECZYC
BERRY & HOVEN

ATTORNEYS

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PROTECTING YOUR ASSETS DURING LIFE



Estate planning involves not only providing for the transfer of assets after death, but also protecting assets and loved ones during life. For those owning a family business (including ranches and farms), estate planning also involves business succession planning when there is a desire to keep the business in the family for future generations.

As Montana estate planning lawyers and business succession attorneys, we help clients with all of these matters. We typically provide estate planning services on a fixed-fee basis after we understand a client's needs and objectives.

We understand that everyone's estate planning needs will be unique. Clients with modest estates may only need a will, while clients with complex assets or minor or disabled children may benefit from a trust. High net-worth clients may need sophisticated tax planning strategies concerning asset transfer. Our services include:

Wills

Trusts

Powers of Attorney

Special Needs Trusts

Guardianships

Conservatorships

Advanced Directives

Living Wills

HIPAA Release

OUR TEAM



DANIEL AUERBACH

For decades, Dan has helped establish a personal connection with clients, allowing him to earn their trust in handling sensitive matters. As an experienced Montana estate planning attorney, Dan can assist in drafting a will, trust, financial power of attorney, health care power of attorney, or a living will. Dan also assists with trust administration and litigation, helping trustees navigate contentious and noncontentious matters in fulfilling their duties.



MICHAEL RAUSCH

Mike provides clients with estate planning advice tailored to their specific needs. A typical estate plan contains a will, financial power of attorney, living will, health care power of attorney, HIPAA release, and advance directives. The plan may also include current asset information for the personal representative, and real estate forms (including Transfer on Death Deeds).

Mike also represents personal representatives and decedent estates, helping to ensure the smooth handling of creditor claims and distribution of estate assets.



STEVE FITZPATRICK

Estate planning lawyer Steve Fitzpatrick advises clients in the areas of estate planning, probate, trust and estate administration, and will contests.

Whether a matter requires a first set of wills, probating a will, or contesting a will, Steve provides practical and customized solutions, keeping each client's objectives in mind.

PROBATE & ESTATE ADMINISTRATION

As experienced probate and estate administration attorneys, we assist personal representatives and estate administrators in all aspects of probate, including legal filings, asset distributions, and providing advice when there is no will or asset distribution is unclear. We appreciate that in most cases, an individual serving as a personal representative will not have served in this capacity before. We'll be there to answer questions, and to ensure that legal duties are fulfilled.

We also represent clients with post-mortem estate planning, such as creating a trust or LLC to hold asset distributions (such as real property or a family business).

WILL, TRUST, & ESTATE CONTESTS

We represent personal representatives and beneficiaries in contested matters involving estate administration, will validity, beneficiary entitlement, and other disputes.



“ WE PROVIDE CLIENTS WITH COMPREHENSIVE, AFFORDABLE, TAX-ADVANTAGED ESTATE PLANS TO PROTECT THEIR ASSETS AND THEIR FAMILIES, ”



BRIAN THOMPSON

Attorney Brian Thompson's trusts and estates practice is focused on estate planning, wills and trusts, and long-term planning. He helps families and individuals create estate plans that ensure real property, cash, securities, and other assets are distributed in accordance with a client's wishes, often through non-probate mechanisms (such as trusts and LLCs).

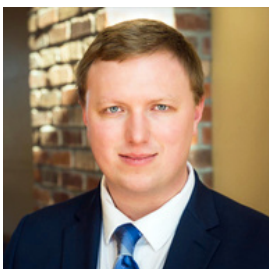
He also is regularly retained to draft estate documents, including special needs, revocable, and irrevocable trusts, wills, advance directives, living wills, and healthcare directives.



JUDD JENSEN

Estate planning can be difficult and challenging, especially for those owning businesses or significant real estate, including farmers, ranchers, and those with mineral rights.

Montana estate planning attorney Judd Jensen provides comprehensive estate planning representation to these and other clients, with the goal of protecting inheritances for beneficiaries, minimizing estate taxes, and furthering succession planning goals (often through the creation of trusts or other wealth transfer transactions) to keep farms, ranches, and other businesses "in the family."



DASH DEJARNATT

Attorney Dash DeJarnatt maintains a broad-based practice, including taxation, real estate, business transactions and corporate governance, trademarks and copyrights, estate planning, and elder law.

Estate planning can be difficult and challenging, especially for those owning businesses or significant real estate. Dash provides comprehensive estate planning representation with the goal of protecting inheritances for beneficiaries, minimizing estate taxes, and furthering succession planning goals.



Your Trusted Montana Legal Team

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