

TRUST & PROBATE ACCOUNTING

SLBiggs understands its fiduciary duties demand the highest level of expertise, loyalty, commitment and care for our clients. We are dedicated to acting solely in their best interests.

SLBiggs provides accounting and fiduciary services for trusts, estates, and court-designated entities such as conservatorships. These services include probate accounting, tax planning and preparation, and administrative services. Additionally, we have been appointed by the court to act as Trustee, Conservator, Guardian, and to serve in other fiduciary capacities.

Our trust accounting expertise includes probate accounting for complex trusts with assets that include operating businesses, multi-family rental and commercial properties, managed investment accounts, and other sophisticated investments from a few million to hundreds of millions of dollars in value. We have traced and recovered unidentified assets for elderly decedents' estates and have assisted in dispute resolution among beneficiaries.

We have served attorneys, trustees, and beneficiaries for over 40 years, managing and marshaling assets, preparing probate and fiduciary accounting for trusts and estates, and providing the substantive results that have bolstered our reputation as experts in this field. Our unparalleled securities and investment knowledge enables us to handle accounting for the most complex portfolios, such as those involving arbitrage and hedging transactions, publicly-traded LLC interests, and other non-conventional investments.

- Trust and Estate Accounting under Probate Guidelines
- Forensic Accounting and Asset Reconstruction for Trusts and Probate Estates
- Litigation Support for Asset Recovery and Contested Trust and Estate Matters
- Tax Planning and Return Preparation for Trusts and Estates
- Trustee and Fiduciary Services for Trusts, Estates, and Court Appointed Protective Services

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