

Respected Estate Planning Attorney comments on recent FL Appeals decision that is reminder to carefully plan estate

Recent opinion of the Court of Appeal in a will contest shows how protracted estate disputes can become. Careful estate planning can prevent many such issues.

CORAL SPRINGS, FLORIDA, UNITED STATES, July 12, 2018
/EINPresswire.com/ -- [Richard Ehrlich](#), a highly respected [Estate Planning attorney](#) in Florida, commented on the recent decision of the District Court of Appeal of Florida, Fourth District, in a [legal](#) dispute over a gentleman's estate.

Comments Mr. Ehrlich, "this case is a stark reminder to carefully plan one's estate to prevent, as much as humanly and legally possible, subsequent disputes."

In that case, Jack Mulvey ("Decedent") died in 2011 with two surviving children and a spouse (his second wife). He had executed a will in 2005, and a

superseding will in 2010 that gave most of the assets to his second wife, Thelma Mulvey ("Widow"). The Decedent's daughter, Sheila Stephens ("Daughter"), sued the Widow. The Daughter claimed the Widow exerted undue influence on the frail Decedent and interfered with her expected inheritance.

“

... this case is a stark reminder to carefully plan one's estate to prevent, as much as humanly and legally possible, subsequent disputes ...”

Richard Ehrlich, Estate Planning attorney in Florida



Richard Ehrlich, Estate Planning attorney in Florida

When the Decedent died, the Daughter petitioned the probate court for administration of the 2005 will, while seeking invalidation of the 2010 will. She argued the 2010 will was the product of the Widow's undue influence on the Decedent, and she alleged that the Decedent lacked testamentary capacity when he executed the 2010 will. The Daughter did not give up and filed a complaint in the circuit court for tortious interference with expectancy. After a trial, the probate court found the 2010 will was valid and not the product of undue influence. The Daughter then filed a complaint in the circuit court for tortious interference with expectancy. The jury found in favor of the Daughter and awarded her \$60,000 in

damages. The Widow appealed, and the Appeals court reversed. The end result of the case, seven

years after the Decedent's death and after four legal proceedings, is the same as intended by the 2010 will.

Says Mr. Ehrlich, "as this prolonged dispute shows, estate matters can be complicated even when there is a written will. But avoidance of protracted legal proceedings and intra-family strife requires careful planning. In fact, estate planning involves several important considerations, including tax consequences and whether certain assets should be transferred before death."

Among the important considerations are "protecting beneficiaries" by giving the assets in the form of a trust that cannot be easily depleted, or giving consideration to special beneficiaries. As in this case, "blended families" (one or both spouses have families from prior marriages) pose special challenges.

Estate Planning requires competent legal advice based on the specific circumstances. Such matters should be reviewed with a competent Estate Planning attorney.

The Website of Mr. Ehrlich is <http://ehrllichlaw.us>. His attorney profile is at <http://www.eldercounsel.com/profile/richard-ehrllich-ehrllich-law-center-pa/>

The underlying legal case is *Mulvey v. Stephens*, No. 4D17-1292 (June 27, 2018) (D. Court of Appeal of Florida, 4th District), available at https://scholar.google.com/scholar_case?case=5189932863824975788&hl=en&as_sdt=20000006

Richard Ehrlich, Attorney
Ehrlich Law Center
(954) 510-1800
email us here

Richard Ehrlich, Esq., attorney in Coral Springs, Florida.



Attorney specializing in Wills, Trusts and Probate, and Securities Arbitration.

Mr. Richard Ehrlich is a specialist in Corporate, Estate and Personal Financial Planning. In the course of his career, he has prepared hundreds of estate plans and helped hundreds of small businesses navigate the various issues involving insurance, retirement and employee retention. He has helped numerous families deal with the difficulties of taking care of elderly relatives and assisted with all of their long-term planning and long-term care needs. Finally, he has helped investors with their losses in unsuitable investments.

Contact

Richard Ehrlich, Attorney at Law
Ehrlich Law Center
9900 W. Sample Rd., Ste. 317
Coral Springs, FL 33065
Phone: (954) 510-1800

Richard Ehrlich Estate Planning Attorney in Florida Attorney Profile

richardehrlichblog.blogspot.com

The screenshot shows a blog post with a title "Richard Ehrlich, Attorney at Law, Florida" and a sub-header "Maryland Court of Appeals rules that Convention between United States of America and Federal Republic of Germany for Avoidance of Double Taxation with respect to Taxes on Estates, Inheritances and Gifts does not supersede state limitations period for seeking refunds of Maryland Inheritance and Estate taxes". The post content is partially visible, mentioning that Mr. Richard Ehrlich is a specialist in Corporate, Estate and Personal Financial Planning.

Richard Ehrlich, Estate Planning Attorney in Florida, Blog

ehrllichlaw.us

Trademark Free Zone Review our Privacy Policy Service Agreement

Website of Richard Ehrlich Estate Planning Attorney in Florida

www.eldercounsel.com/profile/richard-ehrllich-ehrllich-law-center-pa/

The screenshot shows a website profile for Richard Ehrlich. It includes a photo of him, contact information for Ehrlich Law Center PA (9900 W. Sample Rd., Suite 317, Coral Springs, FL 33065), phone (954-510-1800), fax (954-755-6614), email (ehrllichlaw927@gmail.com), and website (www.ehrllichlawcenter.com). It also features a map of Coral Springs, Florida, and a profile link to the ElderCounsel website.

Richard Ehrlich Estate Planning Attorney in Florida Attorney Profile at Eldercounsel

This press release can be viewed online at: <http://www.einpresswire.com>

Disclaimer: If you have any questions regarding information in this press release please contact the company listed in the press release. Please do not contact EIN Presswire. We will be unable to assist you with your inquiry. EIN Presswire disclaims any content contained in these releases.
© 1995-2018 IPD Group, Inc. All Right Reserved.