

Albertson & Davidson, LLP Presents at Hawaii Tax Institute in Honolulu, Featuring Key Insights on Trustee Litigation

San Diego, California – Albertson & Davidson, LLP recently participated in the esteemed Hawaii Tax Institute, held in Honolulu, Hawaii, where firm partners Keith A. Davidson and Stewart Albertson led a high-impact presentation titled Caught in the Crossfire: When Trustees and Their Wealth Transfer Advisor Professionals Are Under Attack. The event featured a special guest, Judge David J. Cowan of the Los Angeles Superior Court, who joined the session to share his judicial perspective on complex trustee litigation.

This presentation addressed the increasingly complex and high-stakes world of trust administration and the heightened risks that trustees and their associated wealth transfer professionals face in today's legal climate. The session, geared towards estate planning attorneys, CPAs, and financial advisors, offered practical guidance on avoiding common pitfalls in trust administration and strategies for defending trustees when litigation arises.

The presentation covered several key topics, including:

- Managing trust administration issues to strengthen legal positioning before litigation arises;
- Identifying risk-prone areas that trust trial lawyers often target when bringing claims against trustees;

- Navigating trust administration effectively when a lawsuit is filed;

- Defending trustees and their wealth transfer advisors during litigation;

- Practical tips for trustees who must appear in court on trust or accounting matters.

"We were honored to be part of this year's Hawaii Tax Institute," said Keith Davidson. "Trustees and wealth transfer professionals are more vulnerable to litigation than ever before, and it's essential they have the knowledge and strategies to safeguard themselves. Collaborating with Judge Cowan allowed us to provide attendees with unique insights from both a litigation and judicial perspective."

Albertson & Davidson, LLP is known for its robust representation in trust, estate, and probate litigation. With decades of experience, the firm continues to set the standard for excellence in advocacy and guidance, helping clients navigate complex trust and estate matters while protecting their interests.

For more information about Albertson & Davidson, LLP or to schedule a consultation, visit aldavlaw.com or call 858-209-2309.

Albertson & Davidson, LLP specializes in trust, estate, and probate litigation, providing strategic, results-driven representation for clients across California. With a reputation for handling complex trust disputes, the firm is dedicated to protecting clients' rights and interests in even the most challenging cases.

Albertson & Davidson, LLP believes in helping people resolve their problems, fighting hard for their clients, and being creative in their approach to every problem.

Albertson & Davidson

18029 Calle Ambiente Suite 517

Rancho Santa Fe, CA 92127

858-832-4022

<https://www.aldavlaw.com>

Press Contact : Erik Anson

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