



McGINNIS  
LOCHRIDGE

# WEALTH PRESERVATION AND ESTATE PLANNING PRACTICE GROUP





# WEALTH PRESERVATION & ESTATE PLANNING

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Our Wealth Preservation and Estate Planning attorneys guide clients through the full spectrum of estate planning, probate, guardianship, charitable giving, tax-exempt organizations, and federal tax matters. We advise and represent executors, administrators, trustees, agents, and beneficiaries on fiduciary issues — helping them navigate both the legal obligations of their roles and, when necessary, contested or uncontested trust and estate disputes, including will contests, will construction suits, property characterization disputes, accounting controversies, and breach of fiduciary duty claims.

Our attorneys also bring deep experience to the formation of tax-exempt organizations and the complex issues that follow, including tax-exempt status, charitable contributions, unrelated business income, private inurement, director liability, and matters involving the Office of the Attorney General of Texas.

Our experience includes:

- Developing strategies to minimize estate, gift, generation-skipping transfer, and income taxes
- Drafting wills, trusts, and ancillary documents such as durable powers of attorney directives to physician, and medical powers of attorney
- Forming business entities to support tax planning, succession, and asset protection
- Providing comprehensive legal counsel on related estate, business, and succession planning matters

# TRUST, ESTATE & PROBATE LITIGATION

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We represent personal representatives, trustees, guardians, agents, and beneficiaries in a wide range of contested and uncontested trust and estate matters — including will contests, will construction suits, property characterization disputes, accounting controversies, and breach of fiduciary duty claims. These disputes often emerge from family conflicts and frequently involve family partnerships and other closely held business organizations. Our attorneys are experienced in resolving such matters through both litigation and alternative dispute resolution.

## THE TEAM

### Introducing

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**Douglas J. Paul**  
Practice Group Chair  
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Doug focuses his practice on estate planning through the use of trusts, family business entities, and life insurance, with deep expertise in charitable planning, asset protection, and strategies to mitigate transfer and income tax.



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