



Bette Epstein, Esq.

Representative Cases

Breach of Fiduciary Duty

- Matter involving trustee of a \$12 million trust against claims of breach of fiduciary duty, self-dealing, removal and multiple accounting disputes
- Handled case involving five siblings as beneficiaries of a trust including claims of breach of fiduciary duty, undue influence and elder abuse against family member trustee, resulting in settlement benefitting beneficiaries of more than \$600,000
- Handled case involving bank in its capacity as special co-trustee against allegations of breach of fiduciary duty and surcharge in court trial resulting in motion for judgment granted at end of petitioners' case
- Case involving wife trustee against claims by husband for breach of fiduciary duty, elder abuse and failure to account; trustee provided eight-year accounting resulting in no surcharge against wife
- Family member filed claims against her sibling for breach of fiduciary duty in his capacity as trustee, power of attorney and health care agent resulting in his removal as trustee, revocation of power of attorney and appointment of professional fiduciary as successor trustee
- Case involving breach of fiduciary duty by trustee of family trust related to alleged mis-management of trust assets and failure to account