

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.

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



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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

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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.

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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

Richard Ehrlich, Estate Planning Attorney in Florida, Blog

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Richard Ehrlich Estate Planning Attorney in Florida Attorney Profile at Eldercounsel

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