

Obtained a Favorable Settlement for a Trust Beneficiary in a Declaratory Judgment Action to Determine Whether an Email Amendment to the Trust was Valid and Enforceable

Amundsen Davis represented a trust beneficiary in a declaratory judgment action to determine whether an email amendment to the trust was valid and enforceable. The amendment in question was in the form of an email the settlor had sent to the trustee and other family members shortly before his death. At the time of litigation, there was no well-established Illinois case law on whether an email amendment was valid. We took the position in pleadings and motions that the email constituted a valid amendment by citing precedents establishing that hand written amendments to trusts were found enforceable. The same precedents should apply to email amendments. The case was settled in favor of the beneficiary we represented.

PROFESSIONALS

Gary Zhao
Partner

RELATED SERVICES

Fiduciary, Trust & Probate
Litigation