

Joseph W. Royce

Senior Counsel

Joe Royce focuses his practice on estate planning, wealth preservation and transfer, administration of trusts and estates, and the operation of charitable foundations. He has represented a variety of clients in estate planning matters, from wealthy families that need highly-customized estate planning and succession strategies to individuals who need less complicated planning, in all instances striving to avoid unnecessary conflict and expenses.

Joe also guides family members and executors through each step of will probates and estate administration, including asset appraisal, preparing and filing of estate tax returns, paying debts and taxes, and making certain distributions are made to beneficiaries as the decedent intended. He also advises the firm's litigators on a variety of issues that arise in estate-related disputes, including interpretation of highly-technical document provisions, other will construction issues, allocation of expenses and taxes, and the ramifications of settlements.

As both trustee and attorney for several private charitable foundations, Joe handles many aspects of their operations, including scheduling and documenting meetings, executing strategic plans, grant budgeting and scheduling, and interfacing with financial advisors.

Experience

- Representation of estate/trust beneficiaries in review of accountings of executor/trustee, resulting in addition of substantial value to trusts for the clients.
- Negotiation and implementation of agreement on behalf of estate beneficiary having significant impairments to provide for lifelong professional management of assets available to the beneficiary through her father's estate.
- Representation of fiduciary (executor/trustee) under will having



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Practices
Trusts & Estates

Education
J.D., The University of Texas School of Law (1966)
B.A., Southwestern University (1963)
A.A., Tyler Junior College (1960)

Judicial Clerkships
U.S. District Judge John V. Singleton, Jr.,
Southern District of Texas

Bar Admissions
Texas (1966)

Court Admissions
United States Tax Court (1987)
United States District Court, Southern
District of Texas (1966)

individual and charitable beneficiaries which involved reformation of testamentary trust to provide substantial tax savings, settlement with individual beneficiary and his estate and appropriate distribution of assets to charitable beneficiaries.

- Representation of executor of decedent's estate whose beneficiaries included second wife and children by a prior marriage, with issues including tracing of community and separate property assets, negligence and contractual indemnity claims of third parties against the estate and appropriate disposition of unique assets, resulting in settlement of claims and comprehensive agreement among all beneficiaries regarding administration of estate and distribution of all assets.
- Representation of successor trustee under one spouse's will in review of accountings by executors of estate of surviving spouse/original trustee and negotiation and settlement of amounts due.
- Advice to fiduciaries and to beneficiaries under wills and trust agreements as to respective rights and responsibilities and procedures involved in fiduciary management of assets.
- Representation of clients before Internal Revenue Service regarding estate tax and gift tax disputes.

Press Releases

- "Joe Royce Honored with Phi Delta Theta Alumnus of the Year Award" (July 27, 2016)

Honors

- Selected by his peers for inclusion in Woodward/White, Inc.'s *The Best Lawyers in America* in the fields of Trusts & Estates and Trusts & Estates Litigation (2008 – 2020)
- AV Preeminent® rated (the highest possible Martindale-Hubbell Peer

Review Rating designation)

Organizational Involvement

- State Bar of Texas
- Houston Bar Association
- Phi Delta Phi