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TOP ESTATE AND WEALTH MANAGEMENT LAWYERS 2025

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COSTA MESA

Mary Doerges Frey has built her practice around estate planning, trust administration, probate, wealth management and asset protection since 2009.

She works with families across multiple generations to develop comprehensive wealth plans and protect assets from probate court proceedings. The practice allows her to establish relationships that extend beyond individual clients to their children and grandchildren.

Two cases have shaped her approach to the work. The first involved a probate matter where the deceased had no immediate family. "The deceased had no immediate family, requiring us to trace intestate succession through multiple layers that ultimately identified 27 heirs scattered across the United States," Doerges Frey said. The administrator, a second cousin, had no knowledge of who the heirs were or where they lived. The case required coordinating communication among parties in different states while meeting court deadlines.

The second case involved trust litigation where a child attempted to invalidate a trust and alleged elder abuse and undue influence against her client. The discovery process revealed unexpected information. "Through diligent investigation, we subpoenaed personal bank statements that revealed the accusing party had actually been stealing from the parents," Doerges Frey said. The case settled with her client retaining the majority of assets.

The litigation matter required overcoming resistance to discovery requests and managing motion practice to obtain financial records. Doerges Frey also worked with her client through the stress of facing accusations.

"This reinforced two critical lessons: the importance of digging deep into financial records to uncover the truth, and that our legal system provides the tools to pursue discovery even against aggressive opposition," she said.

Current developments in the field include client concerns about government stability and potential changes to tax law. Doerges Frey sees families seeking structures that can adapt to shifting tax environments. Blended families present planning challenges that require specific solutions. Concerns about elder financial abuse have increased, and younger clients are beginning planning earlier in their lives.

"The most significant trend is heightened client uncertainty regarding government stability and potential tax law changes, driving more proactive planning conversations," Doerges Frey said.