

## Thomas A. Boulden

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Partner

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*Litigating matters which arise out of Estates or Trusts requires a knowledge of the law and an understanding of the dynamics of the participants.*



Thomas Boulden is a partner at Timoney Knox and focuses his practice in estate litigation. In his 20 years of representation of clients in the Orphans' Courts of Pennsylvania, he has extensive experience in the areas of will contests, trust, fiduciary and surcharge litigation as well as guardianships for incapacitated persons. He has experience representing both fiduciaries and beneficiaries. In addition to litigation matters, Mr. Boulden assists and counsels clients in estate planning and the review and interpretation of estate documents.

Mr. Boulden has successfully handled matters at the trial court level as well as on appeal. He has been lead counsel or co-counsel in matters before the Pennsylvania Superior Court, the Commonwealth Court of Pennsylvania and the Supreme Court of Pennsylvania.

Mr. Boulden received his bachelor's degree in 1984 from West Chester University graduating *magna cum laude*. While at West Chester he was a member of the Men's Lacrosse Team. In 1991 he graduated from the Widener School of Law where he was on the Moot Court Honor Board as the DiBona Chairperson in 1990-91 and was a member of the interscholastic Moot Court team. He was awarded the designation of Order of Barristers.

Mr. Boulden is a frequent author and lecturer on estate litigation and estate planning areas for the Pennsylvania Bar Institute and the Montgomery Bar Association. He is a member of the Pennsylvania, Montgomery and American Bar Associations. As a member of the Montgomery Bar Association, he has been the chair or co-chair of the

### Areas of Practice

- Commercial and Civil Litigation
- Wills, Trusts and Estates Law

### Bar Admissions

- Pennsylvania, 1991

### Education

- Widener University School of Law, Wilmington, Delaware, 1991
- West Chester University, West Chester, Pennsylvania, *magna cum laude*, 1984

Orphans Court Rule Committee for the years 1993-2001 and 2003-2008. Mr. Boulden presently serves as the Vice Chair of the Montgomery County, 2015 Probate and Trust Section.

Mr. Boulden has been honored with inclusion in Best Lawyers in America<sup>®</sup> from 2007-2016.



### **Representative Matters**

- Allebach v. Commonwealth Dept of Finance and Revenue, 546 Pa. 146; 683 A.2d 625 (1996) (Pennsylvania Supreme Court)
- Carl Estate, 17 Fiduc. Rep.2d (O.C. Montg.) (Orphans Court, Montgomery County)
- Coleman Trust, 26 Fiduc. Rep.2d 199 (O.C. Montg.) (Orphans Court, Montgomery County)
- Colton Trust, 22 Fiduc. Rep.2d 81 (O.C. Montg.) (Orphans Court, Montgomery County)
- Dryla Estate, 19 Fiduc. Rep.2d 89; 19 Fiduc. Rep.2d 229
- Freedman Will, 21 Fiduc. Rep.2d 213 (O.C. Phila.), aff'd Pa. Supr (Orphans Court, Philadelphia County)
- Freedman Will No. 2, 22 Fiduc. Rep. 333 (O.C. Phila) (Orphans Court, Philadelphia County)
- Gardner Will, 15 Fiduc. Rep.2d 207 (O.C. Montg.) (Orphans Court, Montgomery County)
- Gavin Will, 17 Fiduc. Rep.2d 246 (O.C. Montg.) (Orphans Court, Montgomery County)
- Harrison Estate, 19 Fiduc. Rep.2d 229 (O.C. Montg. 1999)
- Heinley Estate, Fiduc.Rep.2d 271 (O.C. Montg.) (Orphans Court, Montgomery County)
- Howland Will, 24 Fiduc. Rep.2d 144 (O.C. Wyoming) (Orphans Court, Wyoming County)
- In Re E.B., an Incapacitated Person, 20 Fiduc. Rep.2d 429 (O.C. Montg.) (Orphans Court, Montgomery County)
- In Re Estate of Stephano, 2009 WL 3115720 (Pa. Sept. 2009) (Pennsylvania Supreme Court 2009)
- Newhart Estates, 21 Fiduc. Rep. 383 (O.C. Montg.) (Orphans Court, Montgomery County)
- Pratt Will, 19 Fiduc. Rep.2d 72; 19 Fiduc. Rep.2d 228 aff'd Pa
- Seaton Trust, 26 Fiduc. Rep.2d 354 (O.C. Montg.) (Orphans Court, Montgomery County)
- Volchock Estate, 24 Fiduc. Rep.2d 341
- Volchock Estate No. 2, 25 Fiduc. Rep.2d 113

- W.W. Smith Charitable Trust, 21 Fiduc. Rep. 2d 23; 21 Fiduc. Rep.2d 373
- Zebe Estate, 20 Fiduc. Rep.2d 39 (O.C. Montg.) (Orphans Court, Montgomery County)

### **Classes/Seminars Taught**

- Closing the Estate: Settlement Agreement or Court Approval, Estate & Elder Law Symposium, Pennsylvania Bar Institute, 2016.
- Interaction Between Fiduciary Accounting Income, Trust Taxable Income and Distributable Net Income, Pennsylvania Bar Institute, 2015
- PA Uniform Principal & Income Act, Pennsylvania Bar Institute, 2015
- "Estate Law Update," General Practitioners Update, Pennsylvania Bar Institute, 2015
- Litigating in Orphans' Court, Pennsylvania Bar Institute, 1997, 2003, 2006, 2009, 2011, 2015
- General Practitioners Update, Pennsylvania Bar Institute, 1999 - 2014
- Estate Law Institute, Pennsylvania Bar Institute, 2006, 2007, 2009-2013
- "Recent Trends in Orphans' Court Litigation", Estate and Elder Law Symposium 2010, Pennsylvania Bar Institute, Philadelphia
- Joint Conference of Professional Trustees and Trust Attorneys, 2008
- Gulf Coast Estate Law Conference, Pennsylvania Bar Institute, 2008
- Current Practical Issues in Orphans' Court Practice, Pennsylvania Bar Institute, 1997, 2003, 2006
- Estate and Elder Law Symposium, Pennsylvania Bar Institute, 2002, 2006
- Avoiding Challenges to Estate Planning Documents, Montgomery Bar Association, 2005
- Orphans' Court Practice and Procedure, Pennsylvania Bar Institute, 2004
- Practice in the Montgomery County Orphans' Court, Montgomery Bar Association, 2002
- Incapacitated Persons Limited and Plenary Guardianships, Montgomery Bar Association, 2001
- Current Practical Issues in Orphans' Court Practice, Pennsylvania Bar Institute, 1997