

T&E Welcomes New Practitioners Committee Members

By Anna Sulkin, Dawn S. Markowitz & Susan R. Lipp

Starting this month, you'll notice some new names on our editorial advisory board list. We've added a committee of practitioners we feel have been underrepresented when it comes to input on content in our magazine. They're relatively new estate-planning attorneys (practicing 10 years or less). They're an impressive group, who've already accomplished a lot in a short amount of time. We hope they'll help us identify topics of interest to other new practitioners in the field, which may serve as good refreshers for our more seasoned readers.

We're delighted to welcome them to the *T&E* family.

Kelsey A. Brock is an associate in the Dallas office of The Blum Firm, P.C., where she focuses on estate planning for high-net-worth individuals and those with emerging wealth. She advises



clients on both the tax and non-tax aspects of estate planning, which includes creating and implementing foundational estate plans and structuring complex transactions involving trusts and other entities.

Kelsey's passion is in charitable planning. She helps many of her clients form private foundations, public charities and other charitable vehicles. Her practice also includes estate administration and the probate of uncontested estates, along with real estate transactions, pre-marital agreements and business formation.

When Kelsey tells people that she's a trusts and estates lawyer, she always describes this area as "nice law." Although trusts and estates attorneys do deal with uncomfortable and unpleasant (but ever-present) topics such as death and taxes, the high touch nature of this field makes it very gratifying. Kelsey enjoys how practicing in trusts and estates allows and challenges her to use multiple parts of her brain. Her approach is to first think about and talk through the big picture when meeting with clients and their advisors and then

take the opportunity to focus and be detail-oriented as she works on the documents themselves. "Plus," shares Kelsey, "trusts and estates lawyers are unique in that we actually need to be able to do some math!"

Because of her strong interest in the charitable aspects of estate planning, Kelsey continues to gain more experience in that space. She finds it personally satisfying to work with clients who are charitably inclined, and that's amplified by the fact that it's so fulfilling for the clients themselves. And, with the estate and gift tax exemptions at their highest levels ever, many clients are asking themselves, "How much is too much for our kids to receive?" Adding a charitable component to the estate plan is a great way for those clients to efficiently pass on "just enough" to their descendants, while also doing a lot of good for their communities.

Beth Fox joined Harrison, Held, Carroll & Wall LLP in Chicago in 2016 after receiving her Juris Doctorate from Chicago-Kent College of Law, magna cum laude. She focuses her practice on estate planning, estate and trust administration and tax planning.

While in law school on a full academic scholarship, Beth interned at Harrison, Held, Carroll & Wall LLP, and served as a Notes and Comments Editor of the *Chicago-Kent Law Review*.

Beth discovered the area of trusts and estates through the entirely unconventional approach of following in the footsteps of her parents, who are both in the field. Growing up in a home attached to the office of her father, a solo practitioner, she had the privilege of observing the intersection of understated giving and the practice of law.



Entering the lives of clients contemplating their own mortality or in the wake of a recent death, her father used the opportunity to help people at their most vulnerable. With his wry sense

of humor (“Creepy will envelopes—how romantic, his and hers”), common sense and selflessness, her father used his J.D. to encourage clients to consider the larger context of their familial relationships in their estate planning, to literally help bury former clients with few people in their lives and to aid proud low income educators by undercharging them in the guise of an “educational” discount. When she realized that a penchant for analyzing texts and writing was sending her on her merry way towards law school (after teenage years of insisting she was heading anywhere but on that clichéd route), she was determined to practice in the area where she’d seen so many opportunities for kindness.

Though she believes many of the challenges young trusts and estates attorneys face are identical to the challenges facing their counterparts in other areas of law, Beth thinks youth might be a particular disadvantage in this field. One reason may be because most clients considering their own estate-planning needs aren’t in their early to mid-twenties and don’t expect someone the age of their grandchildren to counsel them. Another reason, she says, might be because clients expect their estate planner to “look like” she has a certain amount of life experience. In fact, Beth shared that she’s had clients ask her age and/or assume she was the administrative assistant of a senior partner. On the flipside, however, she feels that appearing younger does generate more sympathy when she needs to ask for guidance, particularly in probate court where her presence brings down the average attorney age by a number of years.

Joe Higgins is an associate in the Trusts and Estates Practice Group of Kirkland & Ellis LLP in Chicago. Joe counsels owners of closely held businesses, principals of private equity and venture capital funds, individuals and their families and family offices in connection with tax-efficient wealth transfers, charitable giving, multigenerational planning and business succession planning. Joe’s practice includes advising fiduciaries with regard to the administration of complex and substantial estates and trusts. He also regularly assists

clients with the formation and ongoing administration of charitable entities.

Joe’s desire for a legal career that enables him to develop close, personal connections with clients and their families led him to practice in the area of trusts and estates. Developing these connections is essential to understanding his clients’ objectives and family dynamics. This, combined with guiding clients through the complex legal and tax planning strategies, makes each day vastly different and interesting for him.



The best advice Joe received as a new trusts and estates attorney was to seek out and build a relationship with an experienced mentor. He’s never met an experienced trusts and estates attorney who doesn’t love to chat about technical topics in the field and how he handled it in the past, so find that mentor and then pick up the phone or walk into his office to leverage his experiences for your own benefit (don’t hide behind email!).

Frank D. Paolini is a managing associate in the Chicago office of Dentons US LLP, where he’s a member of the firm’s Trust, Estates Wealth Preservation Group. Frank began practicing in Michigan in 2012 and has been focusing his practice in trusts and estates since the beginning of 2013.

During his first few years of practice, Frank defended a number of trustees in contested litigations involving breach of fiduciary duty claims. In a few of these cases, he went to trial. This work allowed him to develop a unique set of skills in handling trusts and estates controversies, which made

