



contact

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What I love about Trusts and Estates is the human nature of the work. I advise people from a variety of backgrounds, helping them navigate legal concerns that affect us all in some capacity, whether simple or complex.

Kate focuses her practice on all aspects of trusts and estates, from estate planning and probate to estate litigation. She advises clients on various personal and estate planning considerations including the preparation of Last Wills, advance directives, pre- and post-nuptial agreements, revocable trusts, irrevocable life insurance trusts, grantor retained annuity trusts, Medicaid trusts, supplemental needs trusts, spousal lifetime access trusts, and irrevocable trusts. Kate counsels clients on planning goals for both simple and complex estates, asset preservation, Medicaid planning, estate tax implications, and potential litigation risks.

Kate assists fiduciaries and beneficiaries, providing guidance through all stages of the probate and estate administration process, including initiating various Surrogate's Court proceedings, both contested and uncontested. She is well versed in the preparation of Surrogate's Court petitions, estate tax returns, court inventories, and receipts and releases. Kate has experience handling guardianship proceedings, under both Article 81 and Article 17-A. She has represented clients in litigation matters including contested probate proceedings, contested judicial accountings, contested Article 81 guardianship proceedings, and fiduciary litigation. Clients appreciate Kate's thorough approach to understanding their needs, coupled with thoughtful strategic planning and the ability to explain complex legal concepts in layman's terms.

Kate joins the firm from a boutique trusts and estates practice in New York City where she focused on estate planning, administration, litigation, and elder law.

Prior to attending law school, Kate spent several years at an international auction house, managing various departments, from fine jewelry to oriental rugs and carpets and many more in between. From this experience she has derived an in-depth understanding of the auction process for tangible personal property from consignment to sale.

Outside the Office

I spend my free time chasing a toddler and a bulldog around Brooklyn.

Publications

- "International Charitable Giving: A Primer," *Taxation of Exempts*, July 2024.

Practices

Trusts & Estates

Admissions

Bar Admissions

New Jersey

New York

Affiliations

New York State Bar Association, Trusts and Estates Law Section, Member

New York Women's Bar Association, Member

New York City Bar Association, Member

Education

Benjamin N. Cardozo School of Law (JD, *cum laude*, 2020)

Northwestern University (BA, 2014)

- Art History major
- Departmental Honors in Art History