

News

BCLP LAWYER NOMINATED TO NAEPC ESTATE PLANNING HALL OF FAME

Nov 05, 2021

BCLP Senior Counsel Kathleen Sherby has been nominated for inclusion in the National Association of Estate Planners & Councils (NAEPC) Estate Planning Hall of Fame as an Accredited Estate Planner (Distinguished) nominee with the class of 2022.

This award is given annually in recognition of significant and outstanding lifetime achievements and contributions to the practice and profession of estate planning. NAEPC considers this award and designation to be the highest professional honor and recognition of the pinnacle of achievement and accomplishment within the estate planning profession.

Kathy's practice involves representation of private individuals in all aspects of wealth transfer planning in the U.S. and internationally, including the implementation of sophisticated planning techniques involving grantor retained annuity trusts, family limited partnerships/limited liability companies, charitable remainder trusts, charitable lead trusts and other similar wealth transfer techniques. A particular focus of her practice is estate planning for retirement benefits, integrating the planning for minimization of transfer tax and income tax with the required minimum distribution rules.

Kathy is a well-known national lecturer on all of these topics at significant national conferences. In addition, she is an active participant in the estate planning bar. Among other professional accomplishments, she is a fellow of the American College of Trust and Estate Counsel, and is a past president and a regent emeritus of the college and has served as chair of the Employee Benefits in Estate Planning Committee and as Missouri state chair. She also has served as chair of the Probate and Trust Committee of the Missouri Bar, as chair of the Probate Section of the Bar Association of Metropolitan St. Louis and as president of the Estate Planning Council of St. Louis.

Kathy and other nominees of the class of 2022 will be recognized publicly during the 59th Annual NAEPC Advanced Estate Planning Strategies Conference, scheduled for Nov. 17, 2022.

RELATED CAPABILITIES

- Tax & Private Client
- Employee Benefits & Executive Compensation
- Private Client

MEET THE TEAM



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