

News

BCLP LAWYER JOINS 'ACTEC TRUST AND ESTATE TALK' PODCAST

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BCLP Senior Counsel Kathleen Sherby recently presented as part of the ACTEC Trust and Estate Talk podcast, produced by the American College of Trust and Estate Counsel (ACTEC). Kathy is an ACTEC fellow.

Planning for retirement benefits can be extremely complicated. Kathy outlined her Top 10 recommendations when planning after a client's death for the distribution of retirement benefits under the SECURE Act and Proposed Regulations.

Kathy's practice at BCLP 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 and was recently inducted into the Estate Planning Hall of Fame and named a recipient of the Accredited Estate Planner (Distinguished) designation.

[Listen to the podcast](#), in which Kathy is introduced by BCLP Partner Doug Stanley, co-leader of BCLP's Fiduciary Disputes Team and also a fellow of the ACTEC.

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