Karen E. Yates

Withers Bergman LLP

Partner

Offices: New Haven • Greenwich CT

Tel: +1 203 302 4095

Fax: +1 203 285 1655

Email: karen.yates@withers.us.com

Education: American University, magna cum laude, B.A. • Cornell Law School, J.D.

Admitted: State of CT, 1996 • State of NY, 2004 • Washington D.C., 2003 • Registered Foreign Lawyer in the UK, 2005 • State of PA, 2010

Year joined: 1999

Year became partner: 2005

Overview

Karen focuses on all areas of family wealth planning. Her practice involves estate and generation skipping tax planning, wealth preservation, charitable planning and planned giving, business succession planning, and income tax planning for individuals, estates, trusts and business entities.

Karen also provides legal advice on post-mortem planning, estate and trust administration and probate.

She is admitted to practice in the United States Tax Court.

Publications and speaking engagements

- "Changes to Connecticut's Estate and Gift Taxes," Withers Bergman LLP Briefing Notes, May 2011.
- "Planning For Today: Estate Planning," presentation for Janney Montgomery Scott, June 2010.
- "The single family office structure: Will it stand the test of time?" Family Business Agenda 2010, November 2010.
- "The Preferred Partnership GRAT - A Way Around the ETIP Issue?" 35 *ACTEC Journal 289*, Winter 2009.
- "Individual and Business Tax Update: Estate Tax," presentation for Tucker-Jacobs C.P.E., December, 2009.
- "Reunited (And It Feels So Good): Death and Taxes in Connecticut," presentation for the Connecticut Estate & Tax Planning Council Inc., November 2009
- "Disregarded But Not Forgotten," *Trusts and Estates Magazine*, October 2009.
- "Why Smart Women Finish Rich: Strategies for the Savvy Professional Woman," presentation for Women's' Business & Professional Network, March 2008.
- "Crossing State Borders in Trust and Estate Law: Connecticut," presentation for the New York City Bar Association, December 2007.
- "Charitable Lead Annuity Trusts - A Primer," Karen E. Yates and Stephen Liss, *Taxation of Exempts*, Volume 19/Issue 1, July/August 2007, the Thompson Legal Regulatory Group, or copyright owner as specified in the Journal.
- "Estate Planning in a Time of Uncertainty," presentation / webcast for the *AICPA Practice Report*, October 2005.
- "Connecticut Estate and Gift Tax," Withers Bergman LLP briefing note, July 2005.
- "Installment Sales to Defective Trusts, Dispelling the Myths, Spelling Out the Opportunities," presentation sponsored by Withers Bergman LLP, Connecticut, November and January 2004.

Memberships

- Connecticut Bar Association, Estates and Probate Section (Executive Committee), Tax Section
- New York State Bar Association
- American Bar Association, Real Property, Probate and Trust Law Section, Taxation Section
- Society of Trust and Estate Practitioners (STEP)

On a personal note

Karen's interests include counting to infinity and dividing by zero. When at home, she also enjoys her "junior audiophile" sound system and an increasingly eclectic array of music. Karen hopes someday to perfect her family's mint julep recipe.