

## Karen Yates

PARTNER | NEW HAVEN

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karen.yates@withersworldwide.com



Karen is a partner in the Trust, Estates and Charitable Planning team

Karen's practice is focused on wealth planning. She works with individuals, families and family offices providing legal advice on wealth transfer tax planning and fiduciary administration. As part of the wealth planning process, Karen regularly advises on business succession, charitable giving, and income tax planning for individuals, estates, trusts and business entities, including family offices and private trust companies.

A significant portion of Karen's practice involves restructuring trusts to increase efficiency, address changed circumstances and better suit the needs of the families they benefit.

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SECRETARY **MICHELE DEWAR**

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Michele.Dewar@withersworldwide.com

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### ADMISSIONS

- Admitted in Connecticut
- Admitted in Massachusetts
- Admitted in New York
- Admitted in Pennsylvania
- Admitted in District of Columbia
- Admitted in U.S. Tax Court

### PUBLICATIONS

*'Marie Osmond Plans to Leave Fortune to Charity'* - March 4, 2020, quoted

"2015 Changes to Connecticut Estate Taxes," CBA Estates & Probate Newsletter, June 2015

"Better Not Pout-Like it or Not, US Citizens Owe U.S. Taxes," Trusts & Estates, wealthmanagement.com, December 2014

"New York Tax Law Changes," Connecticut Bar Association Estates & Probate Newsletter, December 2014

"IRS Attacks Common Estate Planning Technique in Estate of Woelbing," CBA Estates & Probate Newsletter, June 2014

"IRS Blesses Decanting?" wealthmanagement.com, May 2014

"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

"Disregarded But Not Forgotten," Trusts and Estates magazine, October 2009

"Charitable Lead Annuity Trusts - A Primer," Taxation of Exempts, Volume 19/Issue 1, July/August 2007

## MEMBERSHIPS

- American College of Trusts and Estate Counsel (ACTEC), Member, Tax Policy Study Committee
  
- Society of Trust and Estate Practitioners (STEP)
  
- Connecticut Estate and Tax Planning Council
  
- AV-Preeminent rated by Martindale-Hubbell
  
- Connecticut Bar Association, Estates and Probate Section (Executive Committee, Decanting Subcommittee)
  
- American Bar Association, Real Property, Trust and Estate Law Section
  
- New York State Bar Association, Tax Section

## TALKS

"Looking Ahead: The long-term benefits of Charitable Lead Annuity Trusts"; Withersworldwide webinar, July 13, 2020

"Whose Trust Is It Anyway?" Connecticut Estate & Tax Planning Council, February 16, 2016

Mismatch Rematch: Realigning the Estate Plan," Federal Tax Institute of New England, October 30, 2015

"Enhancing Your Client's Estate Planning by Using Trusts Created by Their Parents," 41st Annual Notre Dame Tax &

Estate Planning Institute, September 27-28, 2015

"Set it, But Don't Forget It - Pitfalls to Avoid," CBA Estates & Probate Section, April 2014

"Reunited (And It Feels So Good): Death and Taxes in Connecticut," Connecticut Estate & Tax Planning Council, Nov.

2009

**EDUCATION**

Cornell Law School, J.D., 1996

**LANGUAGES**

ENGLISH

**DATES**

JOINED: 2019

**RECOGNITION**

Member of CFGNH Professional  
Advisors Council Karen Yates

Member of CFGNH  
Professional Advisors  
Council

2021 Martindale-Hubbell US  
AV Rating Karen Yates

2021 Martindale-  
Hubbell US AV Rating

2020 Best Lawyers US Recognized  
Karen Yates

New Haven

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