



Kelly A. Barse

ASSOCIATE

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LOCATED IN

Philadelphia, PA

MEET KELLY

"I enjoy coming up with solutions to fit the unique needs of a family, in ways that provides clients with a sense of security about the future needs of their family."

— Kelly A. Barse

Kelly concentrates her practice exclusively on estate and trust law, including estate planning and asset protection, fiduciary litigation, and trust and estate administration. She counsels clients on estate planning objectives, including tax planning, wealth preservation, and managing family dynamics, and on all aspects of estate administration, such as collecting, valuing, and distributing estate assets. Kelly works with clients to craft comprehensive estate plans that can put their minds more at ease concerning a difficult topic.

Kelly is a trusted advisor throughout the daunting process of an estate administration. For many people it's their first time handling an estate, so it can be a stressful experience on top of the grief they are experiencing after the loss of a loved one. She assists by providing them with a clear outline of their responsibilities and what to expect during an estate administration and also is there to provide advice when unexpected problems arise.

In her free time Kelly enjoys yoga, spending time with her husband and dog, especially at the Jersey shore, and travelling. When not in the office, she can often be found at the rock climbing gym.

EXPERIENCE

Kelly has broad experience in drafting wills, revocable and irrevocable trusts, including ILITs, directed trusts, pet trusts, as well as prenuptial and postnuptial agreements. She is also knowledgeable in federal and state estate and inheritance tax returns, gift tax returns, personal income tax returns, and fiduciary income tax returns. Kelly regularly prepares informal accounts and family settlement agreements, and

advises fiduciaries regarding responsibilities and fiduciary standards.

NEWS & INSIGHTS

Important Retirement Account Changes Under the SECURE Act

June 03, 2020

Remote Notarization for Certain Estate Planning Documents During Coronavirus Emergency

May 04, 2020

When Is It Time To Update My Estate Plan?

April 03, 2020

ACTIVITIES & HONORS

In law school, Kelly was a recipient of the Pro Bono Publico Award for Significant Service, and served as an Associate Articles Editor of the Journal of Law and Religion. She also volunteered her time at the Volunteer Income Tax Assistance (VITA) project.

EDUCATION

Temple University Beasley School of Law, LL.M. in Taxation, Estate Planning Certificate

Rutgers School of Law, JD

Rutgers University, BA

ADMISSIONS

Pennsylvania

New Jersey

CAPABILITIES

Trusts & Estates

Trust & Estate Administration

Estate Planning & Asset Protection

Fiduciary Litigation