

Abbie R. Pappas

Counsel



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Practices/Industries

- Trusts & Estates
- Business Succession Planning
- Estate & Gift Tax Controversy
- Trust, Estate & Fiduciary Litigation

Education

The Ohio State University
(B.A., *summa cum laude*,
2010)

Columbia Law School
(J.D., 2013)

Executive Editor, Columbia
Journal of Tax Law

Overview

Abbie is an experienced estate planning, estate administration, and taxation attorney who works closely with clients to develop and analyze estate plans appropriate to their needs and objectives. She has experience in both domestic and international tax and estate planning, and provides counsel on the use of wills and trusts, gift planning, lifetime and post-mortem tax planning, living wills, powers of attorney, and estate administration. Abbie has lectured on the topic of charitable tax planning and has served as pro bono counsel for several nonprofit organizations. She is also experienced with Halachic estate planning and works with clients to develop comprehensive estate plans that conform to Jewish religious laws.

Experience

- Coordinates and implements all aspects of estate planning and estate and trust administration, including planning, research, drafting, and execution.
- Counsels individuals and families in structuring various methods of achieving financial goals and the distribution of wealth, while minimizing the imposition of federal estate, gift, and generation skipping transfer taxes.
- Prepares a variety of complex trust and estate planning documents, including wills, revocable trusts, private settlement agreements, decanting instruments, insurance trusts, Crummey trusts, dynasty trusts, health care proxies and living wills, powers of attorney, and prenuptial agreements.
- Prepares federal estate and gift tax returns and related government filings.
- Works with representatives of charitable organizations to help them obtain and maintain tax-exempt status for their organizations.
- Consults with business owners to structure and implement business succession plans.
- Represents clients in probate and administration proceedings.

Presentations

- “Leaving a Legacy: Jewish and Civil Aspects of Creating a Will,” Cedar Sinai Synagogue (August 2021)
- “Estate Taxes III: Other Important Deductions and Elements of Planning with the Charitable Deduction,” New York University Summer Institute in Taxation (July 2016)

Publications

- “Emergency Wills and a Window of Opportunity,” Cleveland Metropolitan Bar Journal (June 2021)

Involvement

Professional Affiliations

- Estate Planning Council of Cleveland

Abbie R. Pappas

Counsel

Involvement (Cont)

Professional Affiliations

- Cleveland Metropolitan Bar Association (*Estate Planning, Probate and Trust Law Section*)
- Ohio State Bar Association

Community Involvement

- Fuchs Mizrahi School (*Board of Trustees*)
- Jewish Federation of Cleveland (*Board of Trustees; Former Board Chair, Young Leadership Division; Member, Allocations Committee and Professional Advisory Council*)

Honors & Distinctions

- Named to the Ohio Super Lawyers list of Rising Stars (2022)
- Recipient of the Jewish Federation of Cleveland's Amb. Milton A. and Roslyn Z. Wolf Young Campaigner of the Year Award (2021)

Admissions

- State of Ohio
- State of New York