

Kristina E. Kelly

Partner

Stamford, CT

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OVERVIEW

Kristina E. Kelly is a Partner in the Trusts and Estates Practice. She has over 20 years of experience and focuses her practice in the areas of estate planning, trust and estate administration, elder law and residential real estate. Her approach to estate planning is comprehensive, including advising clients on estate tax avoidance strategies, legacy planning for younger generations, lifetime gifting, beneficiary designations, health care directives and powers of attorney.

Kristina represents fiduciaries and beneficiaries in matters before the Connecticut Probate and New York Surrogates Courts and with the Internal Revenue Service (IRS), Department of Revenue Services (DRS) and the New York State Department of Taxation & Finance in obtaining estate tax clearance. She regularly counsels the elderly and their families on capacity issues, including conservatorships and guardianships.

Prior to joining White and Williams, Kristina practiced at several prestigious Connecticut firms including Diserio Martin O'Connor & Castiglioni; Reese, Hirsch, Shoults & Harrison, LLC and Whitman Breed Abbott & Morgan, LLC. Prior to this, she served as Vice President and Corporate Secretary of U.S. Trust Company, National Association.

RECOGNITION AND INVOLVEMENT

Kristina received the Pro-Bono Award, May 2010 from Judge David Hopper, Greenwich Probate Court, and was recognized by Super Lawyers as a Rising Star.

REPRESENTATIVE MATTERS

Developed an estate plan for high-net-worth blended marriage where assets included small family business that satisfied clients' goal to treat children from first marriage similarly to children from current marriage, while providing for the surviving spouse.

BAR AND COURT ADMISSIONS

Connecticut

New York

EDUCATION

Brooklyn Law School, JD, 2003

- Earned the David D. Greenstein Award for Excellence in Employee Pension or Labor Law, Brooklyn Law School (2003)

Manhattanville College, BA, 1994

- Earned the J. Lemmon Prize (Logic), Philosophy Department (1994)
- Earned the Saul Kripke Prize (Logic), Philosophy Department (1993)

MEMBERSHIPS

Member of the Board and the Past President of the Rotary Club of Ridgefield

Member of the Board and the Past President of the Western Connecticut Estate and Tax Planning Council.

Represented the corporate trustee of charitable trust in obtaining a court order to increase trustee fees from provisions provided in trust established in 1920s.

Represented fiduciaries with a NYS Department of Taxation & Finance audit in an estate with multiple real estate holdings, which resulted in nominal settlement satisfactory to the fiduciaries.

Served as Conservator of the Estate for an elderly client from 2008-2014, which included return of client to home when inappropriately placed in nursing home, CT DOL dispute with fired aide, and the sale of the residence when nursing home became appropriate.