

# Snell & Wilmer

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## Julie K. Kelly

Counsel | Phoenix | Portland

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### Main Bio

Julie Kelly focuses her practice in the areas of complex estate and wealth preservation planning, probate and trust administration, fiduciary law, business succession planning, and gift and income taxation as it relates to estates, trusts and individual beneficiaries.

Julie's clients include commercial real estate investors, business owners, physicians, lawyers, executives and farmers. She particularly enjoys advising families regarding inter-generational planning strategies to encourage the smooth transition of wealth, whether it be comprised of the family business, commercial real estate, or the family farm, from one generation to the next.

### Representative Experience

- Provided estate planning counsel to dozens of high net-worth clients regarding advanced planning vehicles such as intentionally defective grantor trusts, irrevocable life insurance trusts and charitable trusts
- Advised \$150+ million real estate developer regarding the establishment of a private foundation
- Modified numerous poorly drafted trusts via nonjudicial settlement agreement and judicial instruction
- Counseled beneficiaries of contested estates regarding their beneficial interests and rights
- Assisted in the tax-efficient transfer of a multi-million-dollar company to successive generations
- Advised dozens of trustees and personal representatives in complex estate and trust administrations subject to federal and state estate tax

### Education

- Willamette University College of Law (J.D.)
- University of Arizona (B.A., *summa cum laude*)
  - Phi Beta Kappa, Liberal Arts and Sciences Honorary, Member

### Professional Memberships & Activities

- Oregon State Bar
  - Taxation Section, Executive Committee, Member
  - Taxation Section, New Tax Lawyer Committee, Chair (2019-2020)
  - Estate Planning and Administration Section, Member

- Taxation Section, Member

## **Representative Presentations & Publications**

- "Planning for the Next Generation," Speaker, PBS Engineering and Environmental, Inc. Board of Directors (December 1, 2021)
- "Safe Harbor for Rental Real Estate Under Section 199A," Author, Oregon State Taxation Section Newsletter (December 2019)
- "Planning for the Next Generation: New Strategies for Farm and Ranch Succession Planning," Speaker, American Agricultural Law Association Educational Symposium (October 2018)
- "Succession Planning and Tax Incentives for the Oregon Farm Owner," Author, Sussman Shank LLP Newsletter (November 2016)
- "Income and Estate Tax Considerations for the Family Farm or Ranch," Speaker, Oregon State Bar (November 2016)
- "The Basics of Bequeathing Bitcoin," Author, WealthCounsel Quarterly (July 2014)

## **Professional Recognition & Awards**

- Snell & Wilmer COACH Award (2024)
- The Best Lawyers in America®: Ones to Watch, Trusts and Estates (2024)
- Oregon Super Lawyers®, Rising Star (2019-2022)

## **Previous Professional Experience**

- Sussman Shank LLP (2016-2020)
- Law Office of Eden Rose Brown/Oregon Probates, LLC (2014-2016)

## **Bar Admissions**

- Arizona
- Oregon

## **Court Admissions**

- United States District Court, District of Arizona
- United States District Court, District of Oregon