K&L GATES

Barbara A. Simanek

Partner

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OVERVIEW

Estate and Trust Law and Employee Benefits: Barbara Simanek is a partner in the firm's private client, trusts and estates practice area with a focus on estate and trust law. She handles all aspects of estate planning and settlement, including the interaction between employee benefits and an individual's estate. Barbara counsels clients on tax planning, business succession planning, and elder law issues, and administers large estates. One aspect of her practice includes analyzing the impact of, and implementing, estate planning strategies such as QPRTs, GRATs, multigenerational trusts, disclaimers, transfer of stock options, family limited partnerships, and split dollar arrangements. She drafts documents associated with such strategies, as well as wills and a variety of trusts, including credit shelter trusts, revocable trusts, irrevocable “Crummey” trusts, defective grantor trusts, and Florida “flite” trusts. Barbara has devoted a portion of her practice to integrating retirement plan assets into an estate plan and focusing on elder law issues.

Prior to joining K&L Gates, Barbara worked for Mellon Bank for 15 years and served as a Vice President Product Manager with responsibility for developing and managing a wide variety of banking products for the financial management of small business, middle market and large corporate customers. She was responsible for a complete line of products for small businesses - deposit accounts, employee benefit programs, cash management services, investment products, and information reporting techniques. In addition, her responsibilities included the management of business deposit operations.

PROFESSIONAL BACKGROUND

- Certified Financial Planner
- Product Manager of Small Business Services, Mellon Bank, N.A.
- Systems Analyst, Southern New England Telephone

PROFESSIONAL / CIVIC ACTIVITIES

- Allegheny County Bar Association
- American Bar Association

- Institute of Certified Financial Planners
- Pennsylvania Bar Association
- Pittsburgh Youth Orchestra, Board Member
- Smith College, Chair of Planned Giving for Class of '73 at Smith College

SPEAKING ENGAGEMENTS

- "Gift and Estate Tax," presented at Community College of Allegheny County CPA Course, June 20, 22 & 24, 2002
- "Retirement Planning: Distributions, Timing & Estate Planning Considerations," presented at the George Harris & Associates CPE Seminar and Paralegals and the Mature Client in Pennsylvania, May 14 and June 19, 2002

EDUCATION

- J.D., Duquesne University School of Law, 1995 *(cum laude; Moot Court Board Bankruptcy Award; Oralist Award at National Tax Moot Court Competition)*
- M.B.A., University of Pittsburgh, 1982
- B.A., Smith College, 1973 *(cum laude, Phi Beta Kappa)*

ADMISSIONS

- Bar of District of Columbia
- Bar of Florida
- Bar of Pennsylvania

AREAS OF FOCUS

- Estate Planning and Trusts & Estates