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As a partner with Fitzwater Law, my practice focuses on all aspects of estate planning and administration, including planning for high-net worth clients with estate/gift tax concerns, blended families and planning for people with special needs. I received my J.D. from Seton Hall University School of Law in 1995, and I hold a LLM in Taxation from New York University School of Law.

I grew up on the east coast and began my career in estate planning in New Jersey in 1995. A serendipitous visit with a college roommate led me a job with the San Francisco office of KPMG, a large accounting and financial planning firm where I worked on developing tax/financial planning strategies for high-net worth clients. But while I had a great view of the San Francisco bay from my office window, I missed my traditional estate planning practice and having a more direct relationship with clients and their families and I began looking for other opportunities. My husband had grown up in the Pacific Northwest and we had spent many weekends visiting with friends and family in Portland. In 2002, we decided to make Portland our home. It wasn't long after our move that I was introduced to Wes Fitzwater and Donna Meyer and happily accepted a position with this law firm. I love practicing in this type of boutique law firm. We have just the right amount of attorneys and staff to provide a collegiate atmosphere and "experts" at my beck and call to answer my questions in other areas of law.

After 23 years of practicing estate planning and estate administration, I believe that promoting family harmony is the core of a good estate plan. My early background as a professor allowed me to develop the skills to explain the law, even technical aspects of the law like taxes and public benefits, in a way that is understandable and practical. I am a visual person so I tend to draw flowcharts and use a white board to illustrate the discussion points for my clients.

I am the past chair (2017) of the Executive Committee for the Estate Planning Section of the Oregon State Bar. I am also one of the founding board members of Griffin's Place, a nonprofit organization dedicated to Empowering individuals 14 years and older with Intellectual/Developmental Disabilities (I/DD) with the knowledge and opportunities they need to engage in activities offered by their community.

I frequently speak on special needs trusts for the Oregon Bar Association and other national organizations such as the Academy of Special Needs Planners. I have published several articles on issues involving special needs and I am one of the authors of the special needs chapter in the Oregon State Bar treatise Elder Law.

EDUCATION

- Seton Hall University School of Law - J.D. (1995)
- New York University School of Law - LLM Taxation (1998)

ORGANIZATIONS

- Oregon State Bar (OSB), Estate Planning and Administration Section and Elder Law Section member
- Academy of Special Needs Planners