



Kathleen Sherby is senior counsel in the Private Client Group and a member of the Fiduciary Litigation Team with Bryan Cave Leighton Paisner LLP in St. Louis, Missouri.

Ms. Sherby's practice involves representation of private individuals in all aspects of wealth transfer planning, including the implementation of sophisticated planning techniques involving grantor retained annuity trusts, family limited partnerships/limited liability companies, charitable remainder trusts, charitable lead trusts and other similar wealth transfer techniques. A particular focus of her practice is estate planning for retirement benefits, integrating the planning for minimization of transfer tax and income tax with the required minimum distribution rules.

Ms. Sherby has represented both trustees and beneficiaries on a wide variety of fiduciary issues and has advised trustees over the years as to their fiduciary duties in administering trusts. As a member of the fiduciary litigation team, she regularly represents trustees and beneficiaries in court controversies involving a variety of issues relating to the administration of trusts and estates. In addition, Ms. Sherby has represented the taxpayer in estate and gift tax audits, in U.S. District Court, the U.S. Tax Court, and in the Missouri Supreme Court.

Ms. Sherby has represented many business owners in developing an effective business succession plan, which has included strategies to transition the business to the next generation as well as working through the sale of the business where appropriate. She has also advised trustees on handling and selling a business and real estate as unique trust assets.

Ms. Sherby's charitable planning experience includes advising nonprofit organizations regarding gift acceptance policies, and the creation of endowment funds and gift annuity programs. She has assisted estate planning clients in the creation and management of private foundations, and charitable remainder trusts. Ms. Sherby is a well-known national lecturer on all of these topics at significant national conferences.

An active participant in the estate planning bar, Ms. Sherby is a Fellow of the American College of Trust and Estate Counsel. She is a Past President and a Regent Emeritus of the College and has served as chair of the Employee Benefits in Estate Planning Committee and as Missouri State Chair. She has also served as chair of the Probate and Trust Committee of the Missouri Bar, as chair of the Probate Section of the Bar Association of Metropolitan St. Louis and as president of the Estate Planning Council of St. Louis.