

Tara M. Walsh

Partner

Malvern, PA

484.323.1357

twalsh@stradley.com



Tara Walsh concentrates her practice in the areas of estate, tax and business planning, as well as estate and trust administration. She represents and advises high-net-worth individuals, owners of closely held businesses, individual and corporate fiduciaries, and nonprofit/charitable entities. Her practice involves designing and implementing a wide range of estate plans; handling all aspects of estate and trust administrations; advising clients on estate, gift and generation-skipping transfer tax issues; counseling clients in planned charitable giving; advising clients on issues related to life insurance and retirement plans; counseling beneficiaries and fiduciaries in Orphans' Court matters; and forming nonprofit organizations.

RESULTS

- assisted in the administration of an estate involving the valuation and sale of a significant closely held family business
- assisted in the structuring and implementation of an estate plan which transferred a significant amount of publicly traded stock from several grantor-retained annuity trusts into a Delaware dynasty trust in order to minimize the overall income tax liability of the trusts
- assisted in the representation of a religious organization in obtaining Orphans' Court approval to enter into a significant, long-term lease agreement in an effort to help ensure the organization's long-term financial viability
- designed and implemented an estate plan involving complex international tax issues from an income tax and death tax perspective

SPEAKING ENGAGEMENTS

- Speaker, "Planned Charitable Giving: The Do's and Don'ts from the Donor, the Donee, and the AG," Philadelphia Bar Association seminar
- Speaker, "Estate Planning: Taking Care of the People You Love," St. Basil Academy
- Presenter, "Plan Today to Ensure Your Legacy Tomorrow," The Main Line Society of Professional Women Event
- Presenter, "Estate and Personal Planning," Gwynedd Mercy University

FOCUS

Trusts, Estates & Personal Planning
Closely Held & Family Owned Businesses
Nonprofit & Religious Organizations
Education
Fiduciary Governance

BAR ADMISSIONS

Pennsylvania
New Jersey

COURTS

Pennsylvania Supreme Court
U.S. District Court for the Eastern District of Pennsylvania

EDUCATION

J.D., *magna cum laude*, Pennsylvania State University Dickinson School of Law
B.A., *magna cum laude*, Lafayette College, Phi Beta Kappa

MEMBERSHIPS

Board for the Greater Philadelphia Society of Financial Service Professionals
Board of Advisors, St. Basil Academy
Main Line Chamber of Commerce, Society of Professional Women
Philadelphia Bar Association
Philadelphia Estate Planning Council

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Tara M. Walsh

Page 2

IN THE COMMUNITY

Tara is involved in the Main Line Chamber of Commerce's Society of Professional Women, a group committed to the advancement of women in leadership roles. She is a graduate of Leadership Main Line, as well as the Main Line Chamber's Women Helping Women mentoring program. Tara also serves on the board of advisors of St. Basil Academy.

