

Tara M. Walsh

Partner

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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.

SPEAKING ENGAGEMENTS

- Presenter, "The Intersection of Death and Divorce: Estate Planning & Family Law Implications Under Marital Agreements," Philadelphia Bar Association CLE
- Presenter, "Business Succession Planning: The Good, The Bad, and The Ugly," Smart Business Dealmakers Conference
- Planner, "Planned Charitable Giving: The Do's and Don'ts from the Donor, the Donee, and the AG," Philadelphia Bar Association seminar
- Presenter, "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

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 is also a Board member for the Greater Philadelphia Society of Financial Service Professionals, and a current participant in The Forum of Executive Women Mentoring Program.

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
Main Line Chamber of Commerce, Society of Professional Women
Philadelphia Bar Association
Philadelphia Estate Planning Council

