



Katherine E. Mulry

STOCKHOLDER

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Practice Areas

Estate Planning & Settlement

- Business Succession Planning
- Executive & Physician Planning
- Trust & Probate Litigation
- Trust Administration & Estate Settlement
- Wills, Trusts & Estate Planning

Trust & Wealth Management

Admissions

State of Connecticut

Education

University of Connecticut
School of Law, J.D. (high honors) (Tax Certificate)

College of the Holy Cross, B.A.
(*magna cum laude*, Phi Beta Kappa)

Overview

Katherine works with individuals and families to develop estate plans that meet their personal objectives, while also taking into consideration tax efficiency. Katherine also routinely represents executors and helps them to navigate the estate settlement process, including the preparation of probate filings and estate tax returns. In addition, Katherine advises clients on various trust administration matters, including trust distributions, terminations and modifications.

Katherine is committed to providing personalized service to each client. She works with clients to develop a comprehensive estate plan which includes both incapacity planning and post-mortem planning. She aims to provide clients with peace of mind that their wishes will be carried out during life and after death. Katherine frequently collaborates with clients' other professional advisors, including accountants, financial advisors, and investment managers, to ensure that their estate plans are consistent with their personal and financial goals.

Representative Experience

- Represented executors in an IRS audit of a federal estate tax return.
- Represented clients in designing an estate plan that significantly benefits charitable causes.
- Advised trustees on termination of several trusts.
- Represented a client with a petition for a name change before a local probate court.

Professional & Community Involvement

- Connecticut Bar Association
 - Estates & Probate Section, Member
 - Young Lawyers Section, Past Member of the Executive Committee
- Aurora Foundation, Past Member of Grants Committee

Publications & Speaking Engagements

- *A Practical Guide to Probate in Connecticut*, Co-Author, MCLE, Inc. 3rd ed. 2025.
- "2024 Developments in Connecticut Estate and Probate Law," Co-Author, *Quinnipiac Probate Law Journal* (publication forthcoming).
- "2023 Developments in Connecticut Estate and Probate Law," Co-Author, *Quinnipiac Probate Law Journal* (publication forthcoming).
- "2022 Developments in Connecticut Estate and Probate Law," Co-Author, *Connecticut Bar Journal* (publication forthcoming).
- "2020 Developments in Connecticut Estate and Probate Law," Co-Author, *Connecticut Bar Journal* (Vol. 95) (2022)

- "2019 Developments in Connecticut Estate and Probate Law," Co-Author, *Connecticut Bar Journal* (Vol. 94) (2021)
- "2016 Developments in Connecticut Estate and Probate Law," Co-Author, *Connecticut Bar Journal* (Vol. 91, No. 1)
- "2015 Developments in Connecticut Estate and Probate Law," Co-Author, *Connecticut Bar Journal* (Vol. 89, No. 4)