Barbara A. Taylor

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

Nonprofit Organizations

Admissions

State of Connecticut

Education

University of Connecticut School of Law, J.D. (with honors, Phi Delta Phi)

Lehigh University, B.S.

Overview

Barbara works with individual clients to tailor their estate plans to accomplish their objectives. She offers options for individuals, couples and families to develop strategies to best transfer assets in productive and successful ways. Barbara also serves as executor and trustee for clients in need of professional fiduciary services. In her role as counsel or fiduciary, Barbara is often asked to be a trusted advisor to her clients on a variety of estate planning issues such as business succession planning, charitable giving, estate, gift and income tax minimization, and asset protection strategies.

Barbara also represents both individual and corporate executors and trustees in estate settlement and trust administration matters. She assists those clients serving as executor by navigating probate and the estate administration process in an economical manner, but with the required attention to detail. Barbara advises her trustee clients on a variety of trust administration matters, including trust construction issues, distribution decisions, and trust terminations.

Barbara also represents individuals and corporate fiduciaries and beneficiaries in estate, trust and other fiduciary disputes, often in probate court. In those matters, she calls upon her many years of experience crafting estate plans and administering estates and trusts to help reach reasonable resolutions to often emotionally charged legal actions. Barbara also often assists clients in a variety of uncontested matters in probate court.

She also represents nonprofit organizations as beneficiaries of estates and trusts, as well as when serving as trustee of trusts, and also helps nonprofit organization structure gifts to properly comply with the donors' wishes on the restricted use of funds.

Barbara listens to her clients, to determine their goals and concerns, and structures her advice and the accompanying legal documents to meet those goals. Each estate plan is crafted for the client in mind and intended to be as streamlined as possible to be clear to the client.

Representative Experience

- Represented a wealthy couple in structuring an estate plan to include both individual and charitable beneficiaries in a tax-efficient manner meeting their family and philanthropic goals.
- Represented a retired executive in creating an estate plan to minimize income taxes on substantial tax deferred assets while also creating trusts for his beneficiaries to add a layer of asset protection.
- Represented the executor of an estate in defense of his sale of business assets in compliance with a stockholder agreement against claims of his beneficiaries.

- Represented a couple in a second marriage in preparing an estate plan to include provisions for each other while also protecting inheritance rights of their children from prior marriages.
- Represented grandparents of a disabled child in establishing a supplemental needs trust to protect the grandchild's inheritance from impacting his public benefits.
- Represented two generations of a family business in structuring lifetime and testamentary transfers in an estate tax-efficient manner to transition the business over time to the next generation.
- Represented a bank in reviewing trust documents to determine if the bank should accept appointment as trustee.
- Represented a nonprofit organization as beneficiary of an estate against an attorney-in-fact who misappropriated the donor's assets.
- Represented the executor of a substantial estate with a complicated probate administration, including the sale of various parcels of real estate and federal and state estate tax issues with interrelated tax calculations.
- Represented the trustee of a trust in determining the meaning and effect of unclear trust provisions and obtaining Probate Court approval to sell real estate owned by the trust.

Professional & Community Involvement

- American College of Trust and Estate Counsel (ACTEC), Fellow
- Connecticut Bar Association
  - Estates & Probate Section, Chair of the Executive Committee
  - Elder Law Section, Member
- American Bar Association, Sections of Real Property, Probate & Trusts and Taxation
- Central Connecticut Business and Estate Planning Council, Past President
- Estate and Business Planning Council of Hartford (EBPC Hartford), Past Director
- Connecticut Estate and Tax Planning Council, Past Director
- Cedar Hill Cemetery and Foundation
  - Board Member
  - Development Committee Chair
- Connecticut Women's Council
  - Past President & Member
- University of Connecticut Foundation, Professional Advisory Committee
- Hartford Foundation for Public Giving, Past Professional Advisory Committee Member

Honors & Awards

- *Super Lawyers Connecticut Rising Star* for Estate & Probate 2025
- AV Preeminent TM Martindale-Hubbell Peer Review Rated
- *The Best Lawyers in America* for Trusts and Estates (2018-2025)
- *The Best Lawyers in America* Ones to Watch 2025
- New England *Super Lawyers Magazine* as a *Connecticut Rising Star* for Estate & Probate (2023-present)

Publications & Speaking Engagements

- Barbara frequently presents on estate and trust topics for the Connecticut Bar Association and other professional and community groups.

- *A Practical Guide to Probate in Connecticut*, Co-Author, MCLE - New England (July 2013)
- "Recent History of the Estate, Succession, and Gift Taxes in Connecticut," Connecticut Bar Association *Estates and Probate Notes and Commentary* Issue No. 63 (July 2006)
- "New Tax Breaks Compete with Traditional Wealth-Transfer Strategies," Co-Author, *Practical Tax Strategies*(March 2002)
- "Will and Trust Drafting Essentials," Connecticut Bar Association (April 2018)
- "The Probate Court and You - Trusts," West Hartford Community Television (April 2018)
- "The Taxation of Third Party Special Needs Trust," Federal Tax Institute (November 2017)
- "Demystifying Probate: Estate Planning - The Basics," West Hartford Community Television (October 2017)
- "Essentials of Will and Trust Drafting," Connecticut Bar Association (October 2016)
- "One Size Does Not Fit All: Essentials of the Estate Planning Process," Connecticut Bar Association 2014 Connecticut Legal Conference (June 2014)
- "Year-End Giving Strategies," Hartford Foundation for Public Giving (November 2013)
- "Year-End Tax and Charitable Gift Planning," Community Foundation of Greater New Britain (November 2013)
- "Case Studies in Estate Planning," Connecticut Women's Council (November 2013)
- "Estate Planning with Retirement Benefits," Estate & Business Planning Council of Hartford (May 2013)
- "Basic Estate Planning," Connecticut Bar Association (April 2013)
- "Basic Estate Planning," Connecticut Bar Association (October 2012)
- "Basic Estate Planning," Connecticut Bar Association (October 2011)
- "A Guide to Probate Accountings," Connecticut Bar Association (May 2011)
- "The Very Latest Tax Developments for 2011 and Beyond," Planned Giving Group of Connecticut (January 2011)
- "Health Care Reform, Estate Planning Pitfalls & Tax Changes - What You Need to Know," Duncaster (October 2010)
- "Basic Estate Planning," Connecticut Bar Association (December 2010)
- "Are You or Someone You Love Getting Older?," Connecticut Alliance of Paralegal Associations (June 2010)
- "Basic Estate Planning," Connecticut Bar Association (December 2009)
- "Planning Giving Techniques," Development Consortium of Greater New Britain (November 2009)
- "Planned Giving Techniques," Baypath College (November 2009)
- "Trust Drafting," Connecticut Bar Association (October 2009)
- "Drafting Your Client's Will: Fundamentals & Technicalities," Connecticut Bar Association (October 2009)
- "Top Estate Planning Techniques: Simple & Effective Wealth Preservation Methods," NBI (September 2009)

News

- Reid & Riege Attorneys Recognized in 2026 Editions of *The Best Lawyers in AmericaÂ®* and *Best Lawyers: Ones to WatchÂ® in America*