PETERSON RUSSELL KELLY LIVENGOOD

Wendy Allard

Partner

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Practice Emphasis

Business Law
Tax
Estate Planning & Probate
Business Planning

About Wendy

Wendy Allard's practice focuses on estate planning, probate, and business transactions. Her accessible and warm-hearted approach puts clients at ease making the legal process less daunting and intimidating. Wendy has extensive experience managing a wide variety of estates from the less complicated to the highly sophisticated. Wendy uses her tax background to leverage clients' business strategies with focused estate planning to minimize their federal and state taxes while also facilitating their personal and family goals.

Understanding that each person has a unique set of values, goals, and ideas is important when counseling clients in regard to their estate plan. Wendy's approach to estate planning is to prepare a customized estate plan based upon each client's situation, goals, and objectives, with a focus on ease of estate administration and plan understanding.

Part of her experience includes sophisticated estate planning for wealth preservation and efficient asset distribution, much of which is tax driven. By listening to client objectives and understanding the nature of their assets and desires, Wendy develops strategies for clients concerning how to best protect assets, minimize taxes, accomplish desired transfers, and minimize disputes after death. She guides clients through determining whether a trust may be desirable, and if so, the terms and conditions that should be established to best accomplish a client's objectives.

Protecting Assets During Life

Wendy also helps clients protect their interests and assets through the preparation of living wills and durable powers of attorney for healthcare and personal needs. She also assists clients who have loved ones with special needs through the creation of special needs trusts.

Probate and Estate Administration

Wendy's probate practice is focused on helping estate administrators comply with their fiduciary duties. She assists administrators with making required filings, paying estate creditors, and distributing assets in accordance with a will, trust, or intestate laws.

Many estate plans and trusts are created with good intentions, but future circumstances sometimes arise that require a close look as to whether those documents are still achieving the goals that they were created to achieve. In these situations, Wendy can often assist heirs and beneficiaries reach creative and mutually agreeable solutions.

Education & Admissions

- LL.M., Tax, University of Washington School of Law
    - Research Assistant to Director Meade Emory
- J.D., Seattle University School of Law, *magna cum laude*
    - Executive Editor, Seattle University Law Review
    - CALI Awards for Academic Achievement: Criminal Law; Intellectual Property; Trusts and Estates; Gift and Estate Tax
- B.A., University of Washington
- Admission: Washington

Representative Matters

- Counsels and assists numerous clients with significant estates in planning and probate matters
- Advises individual and small family business clients on estate planning and business succession planning

Publications & Presentations

- *Gift and Financial Planning: Smart Ways to Plan for the Future and Make Legacy Gifts*, co-presenter, Bellevue LifeSpring, June 18, 2024
- *Wealth Management: Insights on Estate Tax Changes and Estate Planning*, Thought Leader Forum, co-author, Puget Sound Business Journal, May 24, 2024
- Corporate Transparency Act, Application and Compliance, co-presenter, March 21, 2024
- King County Bar Association 19th Annual Probate Administration, speaker, October 2023
- *Is out-of-state property subject to Washington estate tax?*, author, Puget Sound Business Journal, March 2020
- Edward Jones, speaker, October 2019
- *Find the Right Approach to Help a Child Buy a Home*, author, Puget Sound Business Journal, March 7, 2019

Professional & Civic Involvement

- Board Member, Food Lifeline NW, 2023 – present
- Washington Bar Association (Taxation Section; Real Property, Probate and Trust Section)
- King County Bar Association (Real Property, Probate, Trust and Taxation Section)
- East King County Bar Association
- East King County Estate Planning Council

Publications & Presentations Cont.

- Women's Flourishing Financially, Integrity Financial, frequent speaker, 2018-present
- 2017 Taxation Updates, speaker, Auxano Advisors, December 2016
- Five-Star Investment Professional, 2016-2024