Wendy Allard
Partner

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Practice Emphasis

Business Law
Estate Planning & Probate
Tax
Business Planning

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. She remains focused on developing strategies that meet her clients' desires and serve their best interests to protect assets, minimize taxes, make transfers, and minimize disputes.

Estate Planning – Helping Craft a Customized, Easy-to-Understand Plan

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 – Helping Clients through the Final Distribution of a Loved One's Assets, and Preserving Family Harmony

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 law.

Many estate plans are not specific in terms of how assets should be divided, such as when house ownership may be inherited by multiple children. In these situations, Wendy helps heirs and beneficiaries reach an agreement regarding the ultimate distribution of such assets, and to document this agreement through what is known as a TEDRA agreement.

Background and Personal

Prior to entering private practice, Wendy served a clerkship with the Honorable H. Joseph Coleman of the Washington State Court of Appeals, Div. I.

Outside of her practice, Wendy enjoys baking, cake decorating, knitting, and her new hobby-making soap. She lives with her husband, three children, and two dogs, all of whom keep her on her toes.

Education & Admissions

- LL.M., Tax, University of Washington School of Law, 2001
    - Research Assistant to Director Meade Emory
- J.D., Seattle University School of Law, *magna cum laude*, 1999
    - 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, 1996
- Admission: Washington, 1999

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

- Find the Right Approach to Help a Child Buy a Home, Puget Sound Business
- Journal, March 7, 201
- Speaker, 2017 Taxation Updates, Auxano Advisors, December 2016
- Frequent speaker, Women's Flourishing Financially, Integrity Financial, 2018-present
- Speaker, Edward Jones, October 2019
- Five-Star Investment Professional, 2016-2020

Professional & Civic Involvement

- 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