PETERSON
RUSSELL
KELLY
LIVENGOOD

Wendy Allard

Partner

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Legal Assistant: Jocelyn Robinson x4012

Practice Emphasis

Business Law	Estate Planning & Probate
Tax	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. 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

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

- 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