

## Awards

# BCLP LAWYER INDUCTED INTO THE NAEPC ESTATE PLANNING HALL OF FAME®

KATHLEEN SHERBY IS HONORED AS AN ACCREDITED ESTATE PLANNER® (DISTINGUISHED) DESIGNEE BY NATIONAL ASSOCIATION OF ESTATE PLANNERS & COUNCILS

Nov 17, 2022

The [National Association of Estate Planners & Councils \(NAEPC\)](#) has recognized BCLP Senior Counsel Kathleen Sherby as an inductee into the [Estate Planning Hall of Fame®](#) and as a recipient of the Accredited Estate Planner® (Distinguished) designation for 2022. This award was presented on Nov. 17 by NAEPC leadership during a special award ceremony.

Kathy is one of only nine estate planning professionals to receive this prestigious award in 2022, which is given annually in recognition of lifetime achievement and outstanding contributions to the practice and profession of estate planning within the professional disciplines of academia, accounting, insurance and financial planning, law, philanthropy and trust services.

Kathy's practice involves representation of private individuals in all aspects of wealth transfer planning in the U.S. and internationally, including the implementation of sophisticated planning techniques involving grantor retained annuity trusts, family limited partnerships/limited liability companies, charitable remainder trusts, charitable lead trusts and other similar wealth transfer techniques. A particular focus of her practice is estate planning for retirement benefits, integrating the planning for minimization of transfer tax and income tax with the required minimum distribution rules.

Kathy is a well-known national lecturer on all of these topics at significant national conferences. In addition, she is an active participant in the estate planning bar. Among other professional accomplishments, she is a fellow of the American College of Trust and Estate Counsel, and is a past president and a regent emeritus of the college and has served as chair of the Employee Benefits in Estate Planning Committee and as Missouri state chair. She also has served as chair of the Probate and Trust Committee of the Missouri Bar, as chair of the Probate Section of the Bar Association of Metropolitan St. Louis and as president of the Estate Planning Council of St. Louis.

“We are honored to induct Kathy into the Estate Planning Hall of Fame® Class of 2022. Each member has excelled, not only in their respective professional disciplines, but by being recognized as an elite professional by other members of the estate planning community. In addition to Kathy’s own practice expertise, this honoree graciously shares knowledge of the discipline with others nationally. We are grateful to all the inductees for their exemplary leadership and contributions to the profession,” said NAEPC President Julie A. Buschman, CPA, AEP®, CAP®.

NAEPC is a national organization of professional estate planners and affiliated local estate planning councils dedicated to the cultivation of excellence in estate planning. NAEPC fosters the multidisciplinary approach to estate planning by serving estate planning councils and their credentialed members and delivering exceptional resources and unsurpassed education. Furthermore, NAEPC awards and administers the Accredited Estate Planner® (AEP®) designation, the only graduate level, multidisciplinary specialization in estate planning with a focus on the team approach to client relationships, obtained in addition to already recognized professional credentials within the various disciplines of estate planning.

## RELATED PRACTICE AREAS

- Private Client
- Tax & Private Client

## MEET THE TEAM



### **Kathleen R. Sherby**

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