

Karen Yates

PARTNER | NEW HAVEN



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Karen is a partner in the trust, estates and charitable planning team.

Karen's practice is focused on wealth planning. She works with individuals, families and family offices providing legal advice on wealth transfer tax planning and fiduciary administration. As part of the wealth planning process, Karen regularly advises on business succession, charitable giving, and income tax planning for individuals, estates, trusts and business entities, including family offices and private trust companies.

A significant portion of Karen's practice involves restructuring trusts to increase efficiency, address changed circumstances and better suit the needs of the families they benefit.



Talks

- "Looking Ahead: The long-term benefits of Charitable Lead Annuity Trusts (CLATs)," Withersworldwide webinar, July 13, 2020
- "Whose Trust Is It Anyway?" Connecticut Estate & Tax Planning Council, February 16, 2016
- "Mismatch Rematch: Realigning the Estate Plan," Federal Tax Institute of New England, October 30, 2015
- "Enhancing Your Client's Estate Planning by Using Trusts Created by Their Parents," 41st Annual Notre Dame Tax & Estate Planning Institute, September 27-28, 2015
- "Set it, But Don't Forget It - Pitfalls to Avoid," CBA Estates & Probate Section, April 2014
- "Reunited (And It Feels So Good): Death and Taxes in Connecticut," Connecticut Estate & Tax Planning Council, Nov. 2009

External publications

"How the Ultra-Rich Use Trusts to Protect the Family Fortune if Their Heirs Get Sued or Divorced," Business Insider - July 14, 2023, quoted

"Marie Osmond Plans to Leave Fortune to Charity," - March 4, 2020, quoted

"2015 Changes to Connecticut Estate Taxes," CBA Estates & Probate Newsletter, June 2015

"Better Not Pout-Like it or Not, US Citizens Owe U.S. Taxes," Trusts & Estates, wealthmanagement.com, December 2014

"New York Tax Law Changes," Connecticut Bar Association Estates & Probate Newsletter, December 2014

"IRS Attacks Common Estate Planning Technique in Estate of Woelbing," CBA Estates & Probate Newsletter, June 2014

"IRS Blesses Decanting?" wealthmanagement.com, May 2014

"The single family office structure: Will it stand the test of time?" Family Business Agenda 2010, November 2010

"The Preferred Partnership GRAT - A Way Around the ETIP Issue?" 35 ACTEC Journal 289, Winter 2009

"Disregarded But Not Forgotten," Trusts and Estates magazine, October 2009

"Charitable Lead Annuity Trusts - A Primer," Taxation of Exempts, Volume 19/Issue 1, July/August 2007

Admissions

Admitted in Connecticut
Admitted in Massachusetts
Admitted in New York
Admitted in Pennsylvania
Admitted in District of Columbia
Admitted in U.S. Tax Court

Education

Cornell Law School, J.D., 1996

Languages

English

Memberships

American College of Trusts and Estate Counsel (ACTEC), Member, Tax Policy Study Committee
Society of Trust and Estate Practitioners (STEP)
Connecticut Estate and Tax Planning Council
AV-Preeminent rated by Martindale-Hubbell
Connecticut Bar Association, Estates and Probate Section (Executive Committee, Decanting Subcommittee)
American Bar Association, Real Property, Trust and Estate Law Section
New York State Bar Association, Tax Section

Key dates

Year joined: 2019

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