



## Katherine Eshaki Wensink

Member

Cleveland

P: 216.348.5729

“ My broad legal background and ability to identify desired outcomes allow me to develop and implement the best estate plan for your family. ”

### Practice Focus

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- Estate planning and probate
- Probate and estate administration
- Tax and benefits
- Transfer tax planning and audit representation
- Trust and estate litigation
- Family foundation counseling
- Nonprofit
- Social corporate governance and impact investing

Kate is an experienced estate planning attorney and a Member in the Tax and Benefits Practice Group at McDonald Hopkins. She focuses on advising business owners, executives, and professionals along with their families in all areas of estate, business succession, charitable and tax planning. She has extensive experience drafting complex estate and business plans, including charitable foundations and trusts, as well as working with clients through the administration of an estate (including both probate and non-probate assets). Kate uses her prior experience in complex business structures and retirement plan drafting to counsel clients regarding complicated business and retirement plan issues.

Kate earned her J.D. from the University of Michigan Law School at Ann Arbor. She received a B.A. from Purdue University.

### Admissions - Court

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- U.S. Court of Appeals for the 7th Circuit
- U.S. District Court for the Eastern District of Michigan

### Admissions - State

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- Illinois
- Iowa
- Michigan

# Katherine Wensink

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- Ohio

## Education

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- University of Michigan Law School
- Purdue University

## Honors and Awards

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- Named one of the *Best Lawyers in America* (2021-2022)

## Professional Membership

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- Cleveland Metropolitan Bar Association, Estate Planning, Probate & Trust Law Section
- Cleveland Metropolitan Bar Association – Estate Planning Institute; Former Chair of the Executive Committee
- Estate Planning Council of Cleveland, Treasurer
- State Bar of Michigan, Probate & Estate Section
- Iowa State Bar Association
- Illinois State Bar Association, Trusts & Estates Section
- Ohio State Bar Association, Estate Planning, Trust & Probate Section

## Public Service and Volunteerism

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- Cleveland Institute of Art, Member of the Advisory Board
- Union Club Foundation, Member of the Board
- Legal Aid Society of Cleveland/McDonald Hopkins Veteran's Legal Clinic
- CWRU Estate Planning Advisory Council
- Cleveland Museum of Art
  - Gift Planning Advisory Committee; member, former chair
  - Women's Council
- College Now Mentor
- Cleveland Arts Prize Special Prize Juror
- University Hospitals Diamond Advisory Group

## Alerts

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- 6 techniques high net worth individuals should be considering now
- Proposed regulations could limit valuation discounts for family entities

## Blog Posts

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- Considering tax reduction planning? Take action now
- 3 legal documents every 18-year-old needs to have
- Estate planning update - Important tax changes ahead

- Top five reasons for a trust
- Guidance on returning economic impact payments sent to the deceased
- 3 important legal documents for college freshmen
- Why you should consider a prenuptial agreement
- Court finds beneficiaries cannot terminate an irrevocable trust
- 2017 inflation adjustments for income tax and estate tax released
- Do you pay taxes when you sell your home?
- Illinois passes bill to protect digital life after death
- US Supreme Court will hear same-sex marriage cases

### News

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- 50 McDonald Hopkins attorneys recognized in The Best Lawyers
- Lawyer of the Year honorees Riley and Welin among 42 McDonald Hopkins attorneys recognized as 2021 Best Lawyers
- Katherine Wensink featured in Crain's Cleveland Business article on retirement needs of the boomer generation
- "Is your family office prepared to compete to win the M&A game?"
- "Ways To Revisit Irrevocable Life Insurance Trusts"

### Podcasts

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- Episode 13: Estate planning techniques for high net worth individuals

### External Publications

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- "Perpetuate generosity while deriving income advantages," Crain's Cleveland, November 2018
- "Grandma and Grandpa Help Out," livespecial.com, 2015 Northeast Ohio Edition
- "Stock Options: To Gift or Not to Gift?," Probate Law Journal of Ohio, September/October 2014
- "Estate Planning For LGBT Couples," Cleveland Metropolitan Bar Journal, June 2013
- "What Expecting Parents Should Know About Estate Planning," RBMA Monthly Legal Update Digest April 2013

### Events

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- What changes your estate plan needs post-election | Tuesday, November 17, 2020
- Planning techniques to consider now | Friday, June 5, 2020
- Business Succession Planning in 2020 | Tuesday, May 19, 2020
- Aging parents: What you need to know | Tuesday, November 5, 2019
- Trust Planning in a Changing Environment | Tuesday, May 21, 2019
- Out with the old, in with the new: Do your estate and business plans need an update? | Thursday, January 17, 2019
- Vehicles to drive charitable planning both during life and at death, 13th Annual Estate Planning Seminar | Monday, September 24, 2018

- Beneficiary Designations: Who gets the money? | Thursday, June 1, 2017
- 44th Charitable Tax Seminar | Wednesday, June 1, 2016
- Leaving a legacy | Thursday, October 29, 2015

### Speaking Engagements

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- Estate Planning for Non-Traditional Families – Key Elements in Estate Planning, sponsored by the Ohio State Board Association, November 9, 2018
- Ohio Case Law and Legislative Update – The Marvin R. Pliskin Advanced Probate and Estate Planning Seminar, sponsored by the Ohio State Board Association, September 15, 2017
- Estate Planning for Non-Traditional Families – Updates for the Estate Planning Professional, sponsored by KeyBank, May 25, 2017
- Planning for Non-Traditional Families During the Trump Presidency – Cleveland Metropolitan Bar Association, January 17, 2017
- Estate Planning Techniques for Non-Traditional Families – Estate Planning Council of Cleveland, December 16, 2016
- Chair, Cleveland-Marshall College of Law Alumni Association Estate Planning Seminar, October 2012