K&L GATES

Barbara A. Simanek

Partner

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OVERVIEW

Barbara Simanek is a partner in the firm's private client, trusts and estates practice area with a focus on estate and trust law. Barbara currently serves as the practice group coordinator for the private clients, Trusts and Estates practice group, with members spread across the globe.

She handles all aspects of estate planning and settlement, including the interaction between employee benefits and an individual's estate. Barbara counsels clients on tax planning, business succession planning, and elder law issues, and administers large estates. One aspect of her practice includes analyzing the impact of, and implementing, estate planning strategies such as QPRTs, GRATs, multigenerational trusts, disclaimers, transfer of stock options, family limited partnerships, and split dollar arrangements. She drafts documents associated with such strategies, as well as wills and a variety of trusts, including credit shelter trusts, revocable trusts, irrevocable “Crummey” trusts, defective grantor trusts, and Florida “flite” trusts. Barbara has devoted a portion of her practice to integrating retirement plan assets into an estate plan and focusing on elder law issues.

Prior to joining K&L Gates, Barbara worked for Mellon Bank for 15 years and served as a Vice President Product Manager with responsibility for developing and managing a wide variety of banking products for the financial management of small business, middle market and large corporate customers. She was responsible for a complete line of products for small businesses - deposit accounts, employee benefit programs, cash management services, investment products, and information reporting techniques. In addition, her responsibilities included the management of business deposit operations.

PROFESSIONAL BACKGROUND

- Certified Financial Planner
- Product Manager of Small Business Services, Mellon Bank, N.A.
- Systems Analyst, Southern New England Telephone

ACHIEVEMENTS

- Listed in *The Best Lawyers in America*® for Trusts and Estates in Pittsburgh, 2024

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PROFESSIONAL / CIVIC ACTIVITIES

- Smith College, Chair of Planned Giving for Class of '73
- Duquesne University, Adjunct Professor–Estates and Trusts, 2017-2023

SPEAKING ENGAGEMENTS

- "Gift and Estate Tax," presented at Community College of Allegheny County CPA Course, June 20, 22 & 24, 2002
- "Retirement Planning: Distributions, Timing & Estate Planning Considerations," presented at the George Harris & Associates CPE Seminar and Paralegals and the Mature Client in Pennsylvania, May 14 and June 19, 2002

EDUCATION

- J.D., Duquesne University School of Law, 1995 *(cum laude; Moot Court Board (Vice President); Bankruptcy Award; Oralist Award at National Tax Moot Court Competition)*
- M.B.A., University of Pittsburgh, 1982
- B.A., Smith College, 1973 *(cum laude; Phi Beta Kappa; Samuel Bowles Prize in Economics)*

ADMISSIONS

- Bar of District of Columbia
- Bar of Florida
- Bar of Pennsylvania

THOUGHT LEADERSHIP *POWERED BY HUB*

- 16 January 2024, 2024 Tax and Estate Planning Opportunities

AREAS OF FOCUS

- Tax
- Estate Planning and Trusts & Estates