BOND SCHOENECK & KING ATTORNEYS

Lindsay M. McKenna

Member

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Profile

Lindsay is deputy chair of the firm's trust and estate practice. She counsels high-net-worth individuals and family groups in sophisticated wealth and estate planning; estate, gift and generation-skipping transfer taxation; income taxation of estates and trusts; and succession planning for closely held and family businesses.

Her clients range from successful entrepreneurs and corporate executives to multigenerational families and their entities. Lindsay works closely with clients at every stage of wealth planning to implement tax efficient wealth transfer and preservation strategies that are customized in order to achieve their business, personal and philanthropic goals.

Lindsay's practice in wealth and estate planning includes:

- Structuring and implementing lifetime and testamentary transfers of wealth
- Creating and funding grantor retained annuity trusts, including gifts of stock in a publicly traded company to GRATs in anticipation of a potential sale
- Representing individual and corporate executors of estates from $5 million to $200 million in connection with the estate administration, including preparation of federal and state estate and fiduciary income tax returns
- Planning for succession of closely held and family-business owners, including addressing family relationship issues that affect both current and long-range aspects of the business operation and family bonds
- Preparing and implementing prenuptial and postnuptial agreements to minimize controversies that can arise in dissolution proceedings, particularly when a family business is involved
- Structuring and implementing gifts to charitable trusts, private foundations and other charitable entities
- Representing colleges and universities in their capacity as beneficiaries of estates and trusts
- Preparing and analyzing wills, trusts, powers of attorney and advance directives for health care, shareholder and operating agreements, and other ancillary estate planning documents

Lindsay also represents individual and corporate fiduciaries and beneficiaries of trusts and estates regarding all aspects of administration, the review and

Education

- University at Buffalo School of Law (J.D., *cum laude,* 2011)
- State University of New York at Buffalo (M.S.W. 2010)
- State University of New York at Buffalo (B.A., *cum laude,* 2007)

Bar/Court Admissions

- New York

Practices

- Trust and Estate

preparation of estate and generation-skipping transfer tax returns, the analysis of fiduciary income tax matters, and trust construction and reformation suits and other contested trust and estate matters.

Honors & Affiliations

- 40 Under 40, *Buffalo Business First,* 2024
- *New York Super Lawyers*®, Upstate New York Rising Star, Estate and Probate, 2021
- Erie County Bar Association, Surrogate Court Practice Committee; Elder law Committee
- Women's Bar Association of WNY, Working Parents Committee
- New York State Bar Association, Trust and Estate Group
- Editor, *Buffalo Law Review*
- Editor in Chief, *Buffalo Public Interest Law Journal*

Other Activities

- Autism Services, Inc., Board of Directors and Secretary
- Buffalo 5/14 Survivor Fund Steering Committee, Member