



Shane M. McCrohan

Senior Counsel

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Profile

Shane's practice focuses on the areas of estate planning, trust and estate administration, succession planning for closely held businesses and income and gift and estate tax planning for high-net worth individuals. He also concentrates on long term care and disability planning, assisting individuals with Medicaid eligibility and Medicaid applications. He has presented extensively on the topics of asset protection and the use of revocable and irrevocable trusts in estate plans.

Prior to joining Bond, Shane was a partner at a respected, boutique law firm in Syracuse, New York focusing on tax, business and estate planning for small businesses. In addition, Shane McCrohan is a CERTIFIED FINANCIAL PLANNER® professional and worked in the Boston, Massachusetts area as a financial planner for five years.

Honors & Affiliations

- New York State Bar Association, Trusts & Estates and Elder Law Sections
- Member, *Phi Beta Kappa*

Representative Presentations

- *Trust-Based Medicaid Planning in Detail*, National Business Institute Seminar: Protecting Assets While Qualifying for Medicaid, August 2019
- *Liens, Estate Recovery and Hardship Waivers*, National Business Institute Seminar: Medicaid Planning, December 2018
- *Tax Planning with Trusts*, National Business Institute Seminar: Using Trusts in Estate Planning and Asset Protection, November 2018
- *Advanced Directive Tips: Making Healthcare Wishes Explicit*, National Business Institute Seminar: Estate Planning: Top 7 Tools to Know, August 2018
- *Marshalling Assets*, National Business Institute Seminar: Estate Administration from Start to Finish, April 2018
- *Utilization of Trusts in Farm Operational and Succession Planning*, Farm Credit East Senior Tax Advisors Seminar, November 2017
- *Qualifying Asset Transfers: Which Techniques Work*, National Business Institute Seminar: Medicaid Planning, February 2017

Education

- Suffolk University Law School (J.D., *cum laude*, 2001)
- Ursinus College (B.A., *summa cum laude*, 1996)

Bar/Court Admissions

- New York
- Massachusetts

Practices

- Trust and Estate

- *Reading Legal Documents – Interpreting Trusts*, Farm Credit East Seminar, November 2016
- *Retirement and Long-Term Care Planning*, NY FarmNet Seminar, April 2016
- *Special Needs Trust and ABLE Account Strategies*, National Business Institute Seminar: Medicaid Planning, February 2015
- *Grantor Trusts*, National Business Institute Seminar: Top Estate Planning Techniques, July 2014
- *Ethical Considerations for Estate Planners in Representing Mentally Impaired Clients*, National Business Institute Seminar: Medicaid and Medicare Update, February 2012
- *Irrevocable Life Insurance Trusts*, National Business Institute Seminar: Trusts 101, November 2011
- *Defective Trusts and Generation-Skipping Trusts*, National Business Institute Seminar: Trusts 201, June 2010

Other Activities

- Chairperson and Board Member, Helio Health, Inc.
- Volunteer, Food Bank of Central New York