goulston&storrs

Carrie Z. Michaelis

Director

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Carrie Michaelis is a trusts and estates attorney advising high-net-worth individuals and their families. Carrie's expertise is in providing sophisticated planning advice for estate, gift, and generation-skipping transfer tax matters. She prepares complex wills and trusts and represents fiduciaries with the full range of estate and trust administration. Carrie also advises clients in connection with charitable giving, including the use of charitable trusts and private foundations, and negotiating and drafting complex gift and endowment agreements.

Carrie's deep, long-term relationships with her clients is the hallmark of her career and core to her value system. She works closely with each client to understand their personal goals in order to establish and execute strategies to preserve assets and apply tax efficient vehicles for transferring wealth to future generations. Her clients appreciate her thoughtful, thorough approach to meeting the long-term needs of their estates.

Before joining the firm, Carrie was a partner in a boutique Manhattan law firm focusing on estate planning and estate and trust administration. Her experience also includes spending over a decade in the Private Clients groups of large New York law firms.

Accolades

- Chambers USA, Band 1, High Net Worth 2023, Private Wealth Law: Mid-Market

Affiliations

- New York State Bar Association
- New York City Bar Association
- Gabriel Zimpritch Poetry Symposium Poetry & Writing Collection at the Thomas Memorial Library in Cape Elizabeth, Maine

Admissions

- New York
- Connecticut

Education

- Duke University School of Law (J.D., 2004)
- Duke University (B.A., 1998)

Representative Matters

Tax-Efficient Estate Plans
Design and implement sophisticated and tax-efficient estate plans that reflect client needs and goals.

Trust and Estate Matters
Advise trustees, executors, and beneficiaries across all trust and estate administration matters.

Trust Modifications, Terminations, and Decanting
Advise clients to achieve trust modifications, terminations, and decanting at appropriate stages of their lifetimes.

Post-Mortem Estate Administration
Handle post-mortem estate administration, including preparing complex tax returns and valuation issues associated with such returns.

Advise artists, authors, and art collectors
Revocable and Irrevocable Trust Arrangement
Draft and execute revocable and irrevocable trust arrangements for advantageous wealth transfer opportunities.