ADLER POLLOCK & SHEEHAN P.C.

Meaghan E. Kelly

Counsel, Providence, RI

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PRACTICE AREAS

Trusts & Estates

Business & Corporate

Tax

EDUCATION

Boston University School of Law, (L.L.M., Taxation, 2011)

Roger Williams University School of Law (J.D., *cum laude*, 2009)

University of Delaware (B.A., 2002)

ADMISSIONS

Rhode Island

Massachusetts

New York

United States Tax Court

OVERVIEW

Meaghan Kelly's practice focuses on all aspects of trusts and estates – including estate and tax planning, taxation, probate, trust administration, including modification and reformation proceedings, offer in compromises, voluntary disclosure settlements, and guardianships proceedings.

Known for her experience in complex estate and trust administration and tax resolution matters – including contested tax matters – Meaghan works with clients to develop effective and efficient plans that center their unique goals and optimize tax advantages. She is well-versed in assisting families in planning for uncertainties in their future. She values authentically connecting with her clients, especially as they experience difficult times, such as grieving a loved one or preparing for death or incapacity.

Meaghan currently co-chairs the Rhode Island Bar Association's Probate & Trust Committee. Before joining Adler Pollock & Sheehan, PC, Meaghan was most recently Of Counsel at Burns and Levinson LLP and previously a partner at a boutique business law and estate planning firm in Providence. Prior to entering the private sector, Meaghan was the Chief of the Estate and Gift Tax Department at Rhode Island's Division of Taxation, where she was responsible for auditing all estate tax returns and reviewing all estate planning documentation accompanying the returns. She also served as Senior Legal Counsel, representing the state of Rhode Island in contested tax matters – including income tax audits, corporate tax audits, and tobacco tax fraud cases. She also served as the Keeper of the Records for the Tax Division, liaising with state and federal agencies.

Meaghan earned an LL.M in Taxation from Boston University School of Law's Graduate Tax Program and, and her J.D., *cum laude*, from Roger Williams University School of Law, where she was a member of the Honors Program and an Articles Editor on the Law Review Editorial Board.

REPRESENTATIVE MATTERS

- Represented professional and individual fiduciaries with efficient administration of complex estate and trust entities.

- Advised trustees in a contested trust administration and accounting matter resulting in settlement without the need for judicial approval.
- Represented corporate trustees in trust termination and modification proceedings in Superior Court.
- Advised professional trustees regarding proper trust administration and termination requests from beneficiaries.
- Successfully negotiated penalty waivers in connection with voluntary disclosure submission for taxpayer compliance with the RI Division of Taxation.
- Successfully obtained probate court approval of emergency guardianship to protect the interests of a ward from continued exploitation.

SEMINARS / PUBLICATIONS

- Presenter, RI Bar Association Annual Meeting, RI Estate Taxation, Practical Considerations & Tips, 2024.
- Co-Presenter, Planning for and Administering a Small Estate, Rhode Island Bar CLE, 2021.
- Presenter, Basic Estate Planning for All, 2023.
- Co-Author, MCLE New England, A Practical Guide to Probate in Rhode Island, 2nd Edition, 2020, Chapter 2, Probating the Will.
- Blog, The Death of “Tax-Free” Internet Shopping-Byer AND Seller Beware – The Future Lies with South Dakota Dept. of Revenue v. Wayfair, Inc. et al.
- Author, Federal Election Commission v. Wisconsin Right to Life, Inc.: How the Court Misconstrues Precedent for a Desired Outcome and Sets Campaign Finance Reform Backwards Three Decades, Money in Politics/Election Law Seminar, Roger Williams University School of Law, 2009.

PROFESSIONAL AFFILIATIONS

- Co-Chair, Rhode Island Bar Association, Probate & Trust Committee.
- Member, Rhode Island Bar Association, Trusts & Estates Committee.
- Member, Rhode Island Estate Planning Council.
- Member, The Rhode Island Foundation Professional Advisory Council.

IN THE COMMUNITY

- Past Member, Board of Trustees, Rhode Island Historical Society.