

## **Kristen M. Lewis**

Counsel | Atlanta

Kristen M. Lewis is Counsel in the Tax Practice at Smith, Gambrell & Russell, LLP.

She has extensive experience in estate planning and wealth protection, “Special Needs Trusts,” estate administration, guardianships, fiduciary matters, trusts for pets, and charitable giving techniques.

Ms. Lewis is nationally recognized for her proficiency in Special Needs Trust planning for persons challenged by disabilities, and is a frequent speaker and author on this topic. She is a Fellow of the American College of Trust and Estate Counsel (ACTEC), and an active member of the Special Needs Alliance, where she has recently served as Co-Editor of that organization’s monthly e-newsletter, *The Voice*. She is also a member of the Academy of Special Needs Planners, the National Academy of Elder Law Attorneys, the American Bar Association, the New York Bar Association Elder Law Section, and the State Bar of Georgia Fiduciary Law Section. She is a former Co-Chair of the Long-Term Care, Medicaid and Special Needs Trusts Committee of the Elder Law, Disability Planning and Bioethics Group of the Real Property, Probate and Trust Law Section of the ABA.

Ms. Lewis received her B.A. degree in French and political science, with highest honors, from Wellesley College in 1981. She earned her J.D. degree from Cornell Law School in 1984. She is admitted to practice law in both New York and Georgia. Since 2012, Ms. Lewis has been selected for inclusion in *Georgia Super Lawyers* in Estate Planning and Probate. Additionally, since 2013 she has been recognized by *Best Lawyers in America*® in Trusts and Estates.

Ms. Lewis currently serves on the Boards of the Center for the Visually Impaired and Champions Community Foundation, and is a past Board Member of All About Developmental Disabilities, as well as the former Board Chair of Georgia Community Supports & Solutions, all of which serve persons with disabilities and their families. She is currently a Board Member of Eagle Ranch, a non-profit that works to unify families, and serves on the Board of Wesley Woods Senior Living, which



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### **Areas of Practice**

Private Wealth Services

Tax Law

Special Needs Planning

### **Bar Admissions**

Georgia

New York

provides affordable housing for seniors of limited means. She is also a member of the Children's Healthcare of Atlanta Legacy Advisors Leadership Council. She is a past Chair of the Board of Directors of the Girl Scouts of Greater Atlanta, Inc. and a former Trustee of the Wellesley College Alumnae Association. She is an active member of St. Jude the Apostle Catholic Church, and serves as an annulment Case Sponsor with the Metropolitan Tribunal of the Archdiocese of Atlanta. She is also a member of the Serra Club of Atlanta, which supports seminarians and religious vocations. In her free time, she volunteers for Canine Assistants, which raises and trains certified service dogs for recipients with disabilities.

Ms. Lewis has co-authored an article entitled, "Top 15 Tips for Estate Planners When Planning for Special Needs," published in *Probate & Property*, Volume 24, Number 2, March/April 2010, which won the magazine's 2010 Excellence in Writing Award for "Best Overall Article - Trusts & Estates." Her paper on "Planning for Beneficiaries with Special Needs" was included in the Fourth Quarter 2012 edition of the *Journal of Estate & Tax Planning* published by the National Association of Estate Planners & Councils. She most recently authored an article entitled "The Crime of the 21st Century: Financial Abuse of Elders," which was published in *Probate & Property*, Volume 28, Number 4, July/August 2014.

In recent years, Ms. Lewis has lectured frequently on the topics of Elder Financial Abuse and Special Needs Planning for Persons with Disabilities for ACTEC, the American Law Institute, the Society of Financial Services Professionals, the Heckerling Estate Planning Institute, the Special Needs Alliance, the National Academy of Elder Law Attorneys, the Stetson Special Needs Institute, the Southern Federal Tax Institute, the Federal Tax Institute of New England, the Duke Estate Planning Institute, the Johanson Estate Planning Institute, the Georgia Federal Tax Institute, the Georgia Institute for Continuing Legal Education, the Atlanta Estate Planning Council, and the Georgia Fiduciary Law Institute. Ms. Lewis is a faculty member for the annual American Bankers Association Advanced Trust School, addressing the complex topic of Special Needs Trust administration. She also regularly presents workshops on these topics to groups of parents and allied professionals.