

# ADELE MCHUGH

Estate Planner

[adele.mchugh@gmail.com](mailto:adele.mchugh@gmail.com)

(135) 418-1220

1232 Traverse Lane, Williston, VT 05495



## LINKS

[linkedin.com/in/adelemchugh](https://www.linkedin.com/in/adelemchugh)

## SKILLS

Tax law

Estate administration

Probate proceedings

Trusts and estates

Tax planning

Asset protection

Elder Law

## LANGUAGES

English

Indonesian

## HOBBIES

Organizing

Reading

Crafting

## EMPLOYMENT HISTORY

### ● Senior Estate Planner at Estate Planning Attorneys of Vermont, VT

Apr 2022 - Present

- Negotiated and prepared estate planning documents for high net worth individuals, including wills, trusts, Powers of Attorney, and advance directives.
- Coordinated with financial advisors, insurance agents, and attorneys to develop comprehensive estate plans that met the client's unique needs.
- Managed probate administration for multiple estates valued at over \$10 million each.
- Successfully negotiated tax settlements with the IRS on behalf of several clients.
- Prepared Gift Tax returns for large charitable gifts made by clients.

### ● Estate Planner II at Vermont Estate Planning Services, VT

Aug 2018 - Feb 2022

- Successfully created estate plans for 100 clients.
- Assisted in the creation of 50 trusts.
- Managed and organized all client information and documents.
- Drafted 10 wills per month on average.
- Reviewed and updated 5 estate plans per week.

### ● Estate Planner I at Estate Planning Specialists of Vermont, VT

Sep 2012 - Jul 2018

- Negotiated and settled an estate valued at \$3 million.
- Wrote a will for a client with assets totaling \$2.5 million.
- Set up trusts for 3 clients worth a combined total of \$4 million.
- Helped 2 clients avoid probate through careful estate planning.
- Successfully managed the sale of a client's property.

## EDUCATION

### Juris Doctor at University of Vermont, VT

Aug 2007 - May 2012

I have learned to research, read, and analyze cases, statutes, and regulations; to write persuasively; and to think critically and creatively.

## CERTIFICATES

### Certified Estate Planning Specialist (CEPS)

Nov 2020

### Certified Elder Law Attorney (CELA)

Aug 2019