

Jerome C. Wegley

Mr. Wegley's practice involves business law (corporate and partnership law, mergers and acquisitions, and business succession planning), asset protection planning, and estate planning and elder law (complex estate planning and administration; nursing home, Medicaid and special needs planning). Prior to joining Knox Law, he worked at Ernst & Young as a Certified Public Accountant. Mr. Wegley regularly lectures on business and tax topics, estate planning, asset protection, wealth preservation, long-term care planning, business succession and special needs planning to a variety of audiences and groups. He serves as Vice President and Treasurer on the firm's Board of Directors.

EDUCATION

- University of Pittsburgh, J.D.
- Gannon University, B.S.

RECENT ACCOMPLISHMENTS

- Successfully structured and implemented succession plans for numerous clients in a variety of industries including \$20 million plastics company and \$8 million manufacturing company
- Developed and presented numerous seminars to regional business owners on succession planning, including information on transferring control and wealth from one owner to another while avoiding any negative impact on the company, employees or community
- Created asset protection plans for multiple clients in high risk occupations, including physicians and business owners, effectively reducing their liability exposure

HONORS

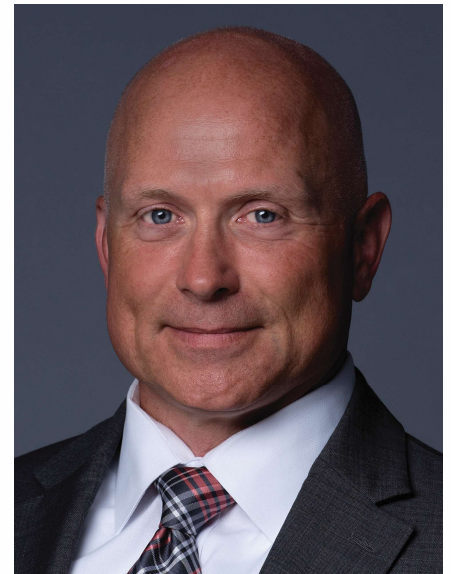
- Included in *The Best Lawyers in America*® (Trusts and Estates), 2019-2021
- 2013 President's Hall of Fame Honoree, *Prep-Villa*

SPEAKING ENGAGEMENTS

- Knox Law Institute®
- Firm's Professional Advisor Symposium, 2013-2020
- LifeWorks Erie Estate Planning Lecture Series, October 2014
- Erie Physicians Network
- National Alliance of Mental Illness (NAMI)
- *Topics include the following:*
- Asset Protection Planning
- Business Succession Planning / Family Succession Planning
- Estate Planning for Blended Families
- Estate Plans of the Rich and Famous
- Grantor Trusts: Income Tax Reporting Demystified
- Long-Term Care Solutions (or Lack Thereof)
- R Trusts vs. Wills
- Special Needs Estate Planning / Planning for People with Disabilities
- Wealth Preservation for Seniors

COMMUNITY & PROFESSIONAL SERVICE

- Erie Catholic School System, *Board Member*
- Erie Catholic Preparatory School (Prep-Villa), *Board Member*
- Hamot Health Foundation, *Board of Corporators*



PRACTICE CONCENTRATIONS

- Business & Tax
- Estate Planning & Administration
- Elder Law

FIRM INVOLVEMENT

- Shareholder
- Board of Directors, *Assistant Treasurer and Assistant Secretary*

ADMISSIONS & CERTIFICATIONS

- Pennsylvania
- New York

PROFESSIONAL AFFILIATIONS

- Erie County Bar Association
- Pennsylvania Bar Association
- Estate Planning Council of Erie
- Pennsylvania Association of Elder Law Attorneys
- National Academy of Elder Law Attorneys
- Pennsylvania Institute of Certified Public Accountants