Nadia A. Havard

Ms. Havard concentrates her practice in all areas of transfer taxes, estate planning and administration, fiduciary income tax and trust administration, and business law. She regularly employs efficient wealth transfer planning techniques and assists clients with estate and tax planning, as well as business successions. She helps nonprofit organizations with tax-exempt status matters with a focus on compliance. Additionally, she helps employers with qualified and non-qualified deferred compensation plans. While in law school, Ms. Havard served as an intern in the New York State Attorney General's Office Health Bureau, conducted legal research on tax benefits of corporate restructuring in Moscow, Russia and worked as a research assistant to a taxation faculty professor at Albany Law School. She speaks English, Russian and German.

EDUCATION

- Albany Law School, J.D.; *magna cum laude; Tax Law; With Honors*
  John Dugan Prize (academic excellence in tax law and policy); Joseph Rosch Prize (highest standing in administrative law); Securities Regulations Prize; Capital Region Bankruptcy Bar Association Justin Mahoney Memorial Prize; Albany Law Review, Member and Associate Editor
- Moscow Pedagogical University, M.A./B.A.; *With Honors*

RELATED EXPERIENCE

- Help businesses avoid unnecessary expenses and ensure compliance, related to qualified and non-qualified deferred compensation plans
- Successfully obtained 501(c)(3) status for a private foundation making contributions to a foreign charity
- Completed complex, semi-complex and simple estate plans
- Worked on appeals regarding federal gift and estate tax
- Obtained tax relief for nonprofit organizations
- Assisted small business owners with business succession and dispute resolutions
- Formed private and public charities
- Advised on Fiduciary income tax planning

HONORS & RATINGS

- "Impact" Award, American Association of University Women, Erie Branch

SPEAKING ENGAGEMENTS

- Firm's Annual Professional Advisor Symposium, October 2013-2016; 2018-2020
- Healthcare Ventures Alliance Long-Term Care Law Seminar, June 2020
- Secure Act Update to Edward Jones Representatives, February 2020
- Secure Act Update to Northwest Bank, January 2020
- Principal and Income Act of PA, NY and OH, to Northwest Bank, March 2018
- Estate Planning Seminar Hosted by United Way of Erie County, February 2018
- Foundation for Sustainable Forests "Loving the Land" Conference, May 2017
- ECBA Lunch-N-Learn Seminar: 2015 Federal & State Statutory and Case Law Update, 2016
- Erie County Bar Association Lunch-N-Learn Seminar: Case Law Update, April 2015
- National Business Institute " Drafting Effective Wills and Trusts" Seminar, 2014
- LifeWorks Erie Estate Planning Lecture Series on Powers of Attorney, October 2014

COMMUNITY & PROFESSIONAL SERVICE

- Estate Planning Council of Erie, *Board of Directors*
- Erie Philharmonic, *Board of Governors Member*
- AAUW, *Member; Past Co-President*
- The Woman's Club of Erie, Inc., *Member*
- Juniors Girl Scouts, *Troop Volunteer*

LANGUAGE PROFICIENCIES

- Fluent in Russian and German

PRACTICE CONCENTRATIONS

- Business & Tax
- Estate Planning & Administration
- Qualified and Non-Qualified Deferred Compensation Plans

ADMISSIONS & CERTIFICATIONS

- Pennsylvania
- U.S. District Court, Western District of Pennsylvania
- New York
- New York Third Judicial Department

PROFESSIONAL AFFILIATIONS

- Erie County Bar Association, *Member and Past Chair of Estate & Trusts Section*
- Pennsylvania Bar Association, *Member*
- Pennsylvania Bar Association Lawyers Saluting Veterans Program, *Volunteer*
- New York State Bar Association, *Trusts and Estates Law Section Taxation Committee Member*
- National Academy of Elder Law Attorneys (NAELA)
- American Society of Pension Professionals & Actuaries (ASPPA), *Member*
- National Center for Employee Ownership (NCEO), *Member*