



Kenneth L. Schubert, Jr.

Owner - Seattle

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A founding member of the firm in 1966, Ken Schubert has devoted a substantial portion of his practice to estate planning, probate and trust administration since 1970. He has extensive experience advising owners of family-held businesses on estate planning and administering large estates and trusts. He is particularly familiar with Washington trust law, having chaired the task force of the Washington State Bar Association that produced the 1984 Washington Trust Act. He also chaired the committee which produced the 1999 Trust and Estate Dispute Resolution Act (TEDRA). This statute provides for mandatory mediation and arbitration of disputes involving trusts and estates. Ken also serves as lead counsel in litigation involving complex trusts, estates, and estate tax disputes.

Ken has an active business practice as well. He acts as outside general counsel to a number of large, closely held family businesses, attending their board meetings and supervising all of the legal work performed for these clients. He has more than 30 years of experience assisting closely held businesses with their specific estate planning needs. He helps family-owned businesses to strategically choose successor managers and to develop best practices to fairly treat non-manager family members. Additionally, he guides new generation owners through the succession process to minimize or eliminate estate or gift taxes.

Services

- ▶ Estate Planning and Probate
- ▶ Trusts and Estates Litigation
- ▶ Tax
- ▶ Federal Tax
- ▶ Privately Held Companies
- ▶ Charitable and Tax-Exempt Organizations

Education

- ▶ University of Washington School of Law, J.D., 1964
 - ▶ Order of the Coif
 - ▶ Comments Editor, *Washington Law Review*

- ▶ University of Washington, B.A., *magna cum laude*, 1961

Admissions

- ▶ Washington, 1964

Professional Recognition

- ▶ Named by peers as "Lawyer of the Year" in the area of Trusts & Estates Law in *Best Lawyers*, 2012
- ▶ Named a "Top Lawyer" for Estate Planning in *Seattle Met* magazine, 2010
- ▶ Named by peers to *The Best Lawyers in America* in the area of Trusts and Estates, 1983-2012
- ▶ Named by peers as a "Super Lawyer" in *Washington Law & Politics* magazine, 2001-2011
- ▶ Named a "Five Star: Best in Client Satisfaction Wealth Manager" in *Seattle* magazine, based on consumer surveys, panel review and independent research, 2007-2008
- ▶ Stouder Award from the Taxation Section of the Washington State Bar Association in recognition of outstanding service, 2008
- ▶ Garvey Schubert Barer's Dallaire Public Service Award, 2008
- ▶ University of Washington Law School Alumni Association's Distinguished Alumnus Award, 1988
- ▶ Washington State Bar Association's Award of Merit and Honor, 1984
- ▶ Martindale-Hubbell AV/5.0 Peer Review Rated

Professional Activities

- ▶ Fellow, American College of Trust and Estate Counsel
- ▶ Past Chairman, Washington Chapter, American College of Trust and Estate Counsel
- ▶ President, Estate Planning Council of Seattle, 1984-1985

Community Activities

- ▶ Member, Planned Giving Advisory Council, Whitman College, 2008-present
- ▶ Member, Board of Directors, Rotary Club of Seattle (Seattle #4), 2007-2009
- ▶ Member, Rotary Club of Seattle, 1990-present
- ▶ Member, Board of Trustees, Children's Hospital Foundation, 2007-present
- ▶ Member, Board of Trustees, Seattle Opera, 1995-2007
- ▶ President, Seattle Opera Foundation, 2002-present
- ▶ Member, Board of Advisors, Institute for Ecumenical Theological Studies - Seattle University School of Theology and Ministry
- ▶ Member, Board of Trustees, Sheldon Jackson College, 1985-1999
- ▶ Past Member, Board of Directors, Junior Achievement of Greater Puget Sound
- ▶ President, Magnolia Community Club, 1982-1983
- ▶ Past Moderator, Magnolia United Church of Christ (Congregational)
- ▶ President, Puget Sound Association of Phi Beta Kappa, 1982
- ▶ Member, Board of Trustees, Bush School, 1984-1989

- ▶ Member, Board of Trustees, Northwest Chamber Orchestra, 1981-1984

Events

- ▶ 2010 Estate Planning Seminar: Who Can Fill Your Shoes?, Garvey Schubert Barer, October 21, 2010
- ▶ "Revoking or Amending Irrevocable Trusts under TEDRA," 52nd Annual Estate Planning Seminar, Washington State Convention & Trade Center, Seattle, WA, October 1-2, 2007

Publications

- ▶ "Form 1099 Reporting: Two Burdensome Rules Repealed, But Some Traps Remain," Garvey Schubert Barer Legal Update, May 2011.
- ▶ "Summary of Changes in Federal Estate and Gift Taxes," Garvey Schubert Barer Legal Update, January 26, 2011.