

# Karen A. Fahrner

## *Of Counsel*

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### PRACTICE AREAS

- Estate and Tax Planning
- Estate and Trust Administration
- Closely Held Business Planning

### EDUCATION

New York University School of Law,  
LL.M. in Taxation (1987)

Temple University James E. Beasley  
School of Law, J.D. (1978)

University of Miami, cum laude  
(1972)

### ADMISSIONS

Pennsylvania (1978)

Florida (1979)



### BIOGRAPHY

Kim advises individuals and fiduciaries on sophisticated and complex estate and trust matters. She has authored numerous articles and whitepapers on these topics and lectured extensively for national, state and local professional organizations.

For over 25 years, Kim has been an active Fellow of the American College of Trust and Estates Counsel, serving on various committees, including State Laws, Financial Action Task Force and Domestic Law. Kim has recently been appointed Chair of the College's Digital Property Committee, where she leads other Fellows in the study and analysis of the impact of this burgeoning new field on traditional estate and trust planning. She has also served as Chair of the Technology Committee of the Philadelphia Bar Association Probate and Estates Section and a member of its Executive Committee.

She is a recipient of the Distinguished Women Award from the Philadelphia Business Journal, and has also been designated, by legislative appointment, to serve on the Decedents' Estates Laws Advisory Committee of the Pennsylvania Joint State Government Commission, recommending and drafting legislation for consideration by the PA General Assembly in the field of trust and estates. She chaired its committee on Digital Assets and served on various other legislative sub-committees regarding Decanting and Directed Trusts and chaired its committee on Terminating Trusts. Kim also provided drafting guidance on the proposed Pennsylvania legislation regarding financial elder abuse.

Kim is a co-author of Bregy on Selected Provisions of the Pennsylvania Probate, Estates and Fiduciaries Code, (Bisel 2016 and 2020 ed.), an important and cited treatise on trust and estate law in Pennsylvania comprehensively covering over 70 years of statutory and case law in the field. In addition, she serves as an adjunct professor at Villanova University School of Law.

Kim is on the Council of the Pennsylvania Real Property, Probate and Trust Section of the Pennsylvania Bar Association, where she serves on its Task Force regarding proposed legislation. She is a past chair of the Delaware Bar Association Committee on Notice to Beneficiaries.

Among her professional activities, Kim served as President of the Philadelphia Estate Planning Council, where she originated the popular "Roundtable" Luncheons for the Council, and served as the moderator and planner of for over 12 years. She served on various other committees and received the Council's President's Meritorious Service Award. A past member of the Board of Directors of the Pennsylvania Bar Institute, Kim designed trust and estate education programs for attorneys in the Commonwealth of Pennsylvania. In addition, Kim also served for over 10 years as a faculty member of a business training organization – the Central Atlantic School of Trust for Bankers.

Prior to joining Heckscher, Teillon, Terrill and Sager, she served as in-house Senior Counsel for a major Philadelphia financial institution and previously held high-level executive positions with a Philadelphia area trust company, serving as President of its Delaware Trust Company subsidiary and CEO of its multi-family office as well as Chief

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Operating Officer and Chief Fiduciary Officer for its Wealth Division. Kim was a partner at a Philadelphia law firm before joining the trust company.

Kim has been devoted to pro bono activities, providing volunteer services in various areas including the Pennsylvania Innocence Project, Wills for Heroes, Thorncroft Equestrian Center, and the Senior Care Center.

She was rated by her peers at the "AV" level in the national list of lawyers published by Martindale Hubbell. She has received the AEP® designation, which is awarded by the National Association of Estate Planners & Councils to recognized estate planning professionals who meet special requirements of education, experience, knowledge, professional reputation, and character.

Kim was a recipient of the 2020 Probate and Trust Law Section Bar Star, awarded to members of the Philadelphia Bar Association who have volunteered their time and expertise to its committees, sections and programming and provided leadership.

### PROFESSIONAL ACTIVITIES

- Author: Bregy on Selected Sections of the Pa. Probate Estates & Fiduciaries Code, George T. Bisel Co. (1991, 1993, 1997, 2000, 2003, 2007, 2013, 2016, 2020), ed. Fahrner, Rouh, Woodward, (treatise on Pennsylvania law of estates, wills, trust).
- DE Sussex County Estate Planning Council Conference 2011: panelist on trust and estate issues. DE Trust Conference 2013: panelist on Financial Action Task Force matters directed to lawyers. NC Estate Planning Conference 2013: speaker regarding Life Cycle of an Estate Plan.
- PA Bar Institute/PA Bankers Association: Faculty/Course Planner.
- PA Bankers' Association, Central Atlantic School of Trust: Past Faculty (ethics; investment responsibility).
- Philadelphia Estate Planning Council: Past President (largest council of wealth professionals in the country); creator and past moderator/planner of monthly Round Tables.
- PA Bar Institute: Past Board Member (teaching arm of PA Bar Association).
- PA Bar Institute Advisory Committee: Past Chair (designing and implementing trust, estate, tax courses).
- Philadelphia Bar Association: Chair of Technology Committee, Probate Section; Past Chair of Task Force on Dispute Resolutions; for its Probate Section Newsletter: authored articles on Guardianship provisions and on Virtual Representation.
- Panelist for Other Professional Associations: highlights include: Trust Situs; Non-judicial Settlement Agreements; Drafting Trusts and Wills; PA Uniform Trust Act; Rules of Procedure and Ethics for Special Needs Clients.

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### MEMBERSHIPS

- Pennsylvania Bar Association
- Philadelphia Bar Association
- Montgomery Bar Association
- Philadelphia Estate Planning Council

### HONORS/AWARDS

- Fellow, American College of Trust and Estates Counsel, Elected 1995
  - Member, Digital Property Committee
    - Chair, Program Committee (2019 – present)
  - Member, Financial Action Task Force Committee
  - Member, Business Planning Committee
  - Former Member, States Laws Committee
- Pennsylvania Joint State Government Commission's Advisory Committee on Decedents' Estates Laws
  - Former Chair, Digital Assets sub-committee
  - Former Member of Decanting and Directed Trusts sub-committees
- AV® Preeminent™ Peer Review Rated by Martindale-Hubbell
- Accredited Estate Planner (AEP), National Association of Estate Planners
- Woman of the Year, 2006, Philadelphia Business Journal

### SPEAKING ENGAGEMENTS

- **2020** Karen A. Fahrner, Author, "Bregy on Selected Sections of the PA Probate, Estates and Fiduciaries Code."
- **2020** Karen A. Fahrner, Guest speaker, answering questions about pending legislation and recent Executive Orders in wake of the Covid-19 pandemic, relating to "Remote On-Line Notarization – PART ONE," (click here to listen to Part One) with Jennifer Zegel, Esq., Ross Bruch, Esq. and Justin Brown, Esq. Listed on Hipcast. April 2020.
- **2020** Karen A. Fahrner, Guest speaker, answering questions about pending legislation and recent Executive Orders in wake of the Covid-19 pandemic, relating to "Remote On-Line Notarization – PART TWO," (click here to listen to Part Two) with Jennifer Zegel, Esq., Ross Bruch, Esq. and Justin Brown, Esq. Listed on Hipcast. April 2020.
- **2019** Karen A. Fahrner, Author, "Potential Enhancements to Pennsylvania Law," Philadelphia Bar Association Probate Section Newsletter, No. 19, June 2019.
- **2019** Karen A. Fahrner, Speaker, "Are the Kids Alright?", Montgomery County Estate Planning Council Annual Meeting, Blue Bell, Pennsylvania.

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- **2019** Karen A. Fahrner, Speaker, "Digital Assets Afterlife – Estate Planning and Administration," Pennsylvania Elder Law Symposium, Philadelphia, Pennsylvania.
- **2019** Karen A. Fahrner, Speaker, "Getting Your Head Out of the Cloud," Philadelphia Bar Association, Probate and Trust Law Section Quarterly Meeting, Philadelphia, Pennsylvania.
- **2018** Karen A. Fahrner, Speaker, "Horton and Harmless Error," American College of Trust and Estate Counsel Digital Property Committee Fall Meeting, Washington, District of Columbia.
- **2018** Karen A. Fahrner, Speaker, "Podcast: Electronic Wills," American College of Trust and Estate Counsel Podcast, Washington, District of Columbia.