



## JESSIE A. GILBERT

### Background

Jessie A. Gilbert is a Principal in Cummings & Lockwood's Private Clients Group and is based in the Greenwich office. Jessie advises high net worth individuals on estate and tax issues, helping them with succession, generation-skipping and asset protection planning. She also represents executors and trustees with respect to probate, estate and trust administration matters, as well as with estate and fiduciary income taxes.

Jessie is a frequent writer and lecturer on estate planning and administration topics, including business succession planning, fiduciary income tax, and the Principal and Income Act. She has also served as a law clerk with the United States Tax Court in Washington, D.C.

In her spare time, Jessie enjoys acting in community theater productions and practicing karate, in which she has a black belt.

### Practice Areas

- Private Clients Group
- Wills, Trusts and Estate Planning
- Probate and Estate Administration
- Fiduciary and Trustee Services
- Wealth Protection Planning
- International Estate and Tax Planning
- National Charitable Planning Group
- Business Succession Planning
- Estate Planning for Hedge Fund and Private Equity Principals
- Estate Planning for Corporate Executives

### Education

- New York University School of Law (LL.M. in Taxation, 1986)
- Case Western Reserve University School of Law (J.D., 1985)
- Hamilton College (A.B., 1982)

### Bar Admissions

- Connecticut, 1989
- New York, 1986



**Jessie A. Gilbert**

**Principal**

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# CUMMINGS & LOCKWOOD LLC

## Professional Organizations

- Connecticut Bar Association, Executive Committee, Past Member
- Estate Planning Council of Lower Fairfield County, Past President
- Greenwich Bar Association

## Professional Recognition

- The Best Lawyers in America. 2018 - Present
- 200 Outstanding Lawyers of Fairfield Country, Stamford Magazine, 2016
- Connecticut and New England Super Lawyers, 2007
- Martindale-Hubbell, AV Rated

## Civic and Philanthropic Activity

- Westport Country Playhouse, Past Board Member
- Darien Arts Center, Past Board Member

## Articles/Publications/Presentations

- Connecticut Uniform Trust Code (CUTC)
- Probate: Connecticut, Practical Law Guide, co-author, Thomson Reuters
- Settlement of Estates in Connecticut, 3d, co-author, Thomson Reuters
- Connecticut Probate Deskbook, co-author, Thomson Reuters
- Don't Kill the Estate Plan -Titling Brokerage Accounts (and Other Assets) in Coordination with Estate Planning Documents
- 10 Opportunities to Take Advantage of IRS Interest Rates