SAMANTHA K. WOLFE

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PROFESSONIAL EXPERIENCE

THE LAW OFFICES OF SAMANTHA K. WOLFE, LLC
Owner (2020-Present) Waynesboro, PA

- Create business plan for the start of a new law firm
- Recruit and retain employees
- Create a budget
- Generate drafting forms for estate planning clients and trust documents
- Design and implement procedures for employees and staff related to business function and client relations
- Acquire office space and office equipment for new venture
- Maintain client relations and referral relationships for business transition
- Formulate marketing campaigns and social media pages to promote the business

MAXWELL SIPE LAW OFFICES, LLC
Partner (2017-2020) Waynesboro, PA

- Network and create new referral sources in a new community
- Educate the community in the area of elder law and the options available to them
- Conduct all client appointments including initial consultations and signings

STEINBACHER, GOODALL & YURCHAK Williamsport, PA
Director of Wealth Protection Planning (2012-September 2017)
Team Leader (2010-2012)
Associate Attorney (2010)

- Conduct initial consultations for estate/tax planning, estate administration, and elder law planning
- Build referral relationships with professionals in the community including financial advisors, attorneys, and accountants
- Present retail seminars aimed at attracting further client business
- Present informative seminars for certified public accountants and attorneys across Pennsylvania
- Provide consultant services to attorneys across the U.S. regarding tax planning
- Write articles covering a variety of legal topics for the law firm newsletter
- Create sophisticated estate plans for high-net worth clients incorporating sales to intentionally defective grantor trusts and the creation of charitable trusts
- Draft complex estate planning documents including Medicaid trusts, grantor trusts, intentionally defective grantor trusts, non-grantor trusts, charitable trusts, dynasty trusts, revocable trusts, deeds, and business documents
- Serve as the lead attorney for multiple high-net worth clients with estates exceeding $30 million (creation, implementation, and administration of the sophisticated estate/tax plan)
- Handle business formation and dissolution issues (bylaws, partnership agreements, operating agreements, assignments, etc.)

- Construct business succession plans (cross purchase agreements, entity purchase agreements, and hybrid purchase agreements)
- Plan for oil and gas interests, including the use of trusts and business entities
- File federal gift tax returns (Form 709), federal estate tax returns (Form 706), and Pennsylvania inheritance tax returns
- Create estate plans for clients engaged in Medicaid planning
- Collaborate with clients' accountants to resolve any tax issues, including trust taxation
- Manage a team of 8-10 individuals, including associate attorneys and paralegals

MAXWELL & MEYERS, LLP Waynesboro, PA
Legal Intern, Summer 2006 and 2007

- Researched and drafted memos regarding elder law topics
- Handled client inquires through written correspondence and telephone calls
- Aided in finalizing power of attorney and will paperwork
- Drafted petitions for trust terminations

ROSEMARY MCDERMOTT, ATTORNEY AT LAW Thurmont, MD
Legal Intern, Summer 2007

- Drafted separation agreements, leases, mortgages, deeds, promissory notes, and wills
- Assisted in conducting client interviews
- Explained legal documents to clients and answered questions relating to the documents
- Researched changes in the law relating to the drafted legal documents
- Drafted correspondence to clients

BOOKS & PUBLICATIONS

- Pennsylvania Trust Guide: 5th Edition, co-authored, published in 2023 by George T. Bisel, Co., Inc.
- Pennsylvania Trust Guide: 2016, 2017, 2018, 2020, 2021, and 2022 Supplement, co-author, published by George T. Bisel Co., Inc.
- Pennsylvania Trust Guide: 4th Edition, co-authored, published in 2019 by George T. Bisel, Co., Inc.
- Protect Your Family! What You Really Need to Know for the Second Half of Life, co-author, published by Advantage Media Group (2015)
- Protect Your Family! What You Really Need to Know for the Second Half of Life: 2nd Edition, co-author, published by Advantage Media Group (2019)
- 8 Critical Thoughts to Consider when Estate Planning for Oil and Gas Interests in Pennsylvania, published by Wealth Counsel Quarterly (January 2023)
- What Are Your Retirement Plans, published by the Woman's Journal (2013)
- The Million Dollar Question: When Is The Best Time to Become an Olympic Shuffleboard Player, published by Williamsport Sun Gazette (2012)
- What is a Trust?, published by the Woman's Journal (2012)
- Planning for Disaster... Don't Plan Backwards, published by the Woman's Journal (2012)
- FLPs & LLCs Are Not All They Are Cracked Up To Be, published by the Woman's Journal (2011)
- How to Protect the Money you Receive from Your Gas Lease and Royalties, published by the Woman's Journal (2011)
- Written materials for Pennsylvania Bar Institute programs including but not limited: *Lessons Learned: Top 5 Trust Strategies After 1 Year of Tax Reform*; *Basics of PA Trusts: What's in Your*

Closet?; *SECURE-Now What?: Retirement Post-Secure*; *Tough Problems in Estate Planning: Businesses Within An Estate*; *Tough Problems in Estate Planning: Tax Issues*; *Get Your Trust Together: 9 Pitfalls to Avoid When Drafting a Trust*; *When a Long-term Care Illness Hits a Family Business*; *Tools of the Trade: FLPs v. Trusts*; *What's Cooking with FLPs?*; *Succession Planning for Your Elder Law Client's Family Owned Business*; *An Elder Law Attorney's Guide to Estate Planning for Oil, Gas & Mineral Rights*; *What Every Elder Law Attorney Needs to Know about FLPs*; *Estate Planning for Clients Who Own Gas, Oil & Mineral Rights*; *Use of FLPs in Estate & Succession Planning*; *FLP Taxation & Formation*; *Gas Leases & Royalties Owned by FLPs*; *Your Guide to Elder Law*; *Asset Protection for the Middle Class; Trust Guide for Elder Law Attorneys;* and *The Myths & Truths of Estate Planning for Oil and Gas Interests*.

PROFESSIONAL SPEAKING

- *May the Force Be With You*, Delaware County Estate Planning Counsel (September 2022)
- *IRA Basics Post SECURE Act*, Pennsylvania Bar Institute (June 2022)*
- *When a Long-term Care Illness Hits a Family Business*, Pennsylvania Bar Institute Elder Law Institute (July 2021)*
- *SECURE Act– Now What?: Retirement Post-SECURE*, Pennsylvania Bar Institute (June 2021)*
- *Basics to PA Trusts: What's In Your Closet?*, Pennsylvania Bar Institute Estate & Elder Law Symposium (February 2021)*
- *Lessons Learned: Top 5 Trust Strategies After 1 Year of Tax Reform*, Pennsylvania Bar Institute Estate & Elder Law Symposium (February 2020)*
- *Trust Guide for Elder Law Attorneys*, Pennsylvania Bar Institute Estate & Elder Law Symposium (February 2020)*
- *Get your Trust Together:9 Pitfalls to Avoid When Drafting a Trust*, Pennsylvania Bar Institute Estate Law Institute (November 2019)*
- *Trust Guide for Elder Law Attorneys*, Pennsylvania Bar Institute 22nd Annual Elder Law Institute (July 2019)*
- *Tax Apportionment*, Pennsylvania Bar Institute "Tough Problems in Estate Planning," (December 2018)*
- *Businesses Within an Estate*, Pennsylvania Bar Institute "Tough Problems in Estate Planning," (December 2018)*
- *Business Succession Planning for Your Elder Law Client*, *Retirement Planning for Your Elder Law Client*, Pennsylvania Bar Institute "Your Guide to Elder Law," (December 2018)*
- *Getting to Yes: How to Overcome Common Objections*, The Million Dollar Solution (September 2018)
- *Transitioning your Elder Law Practice*, Pennsylvania Bar Institute 21st Annual Elder Law Institute (July 2018)*
- *Tax Cuts and Jobs Act: How it Affects Your Elder Law Client*, Pennsylvania Bar Institute 21st Annual Elder Law Institute (July 2018)*
- *My Client's Dead, Now What?*, Pennsylvania Bar Institute (May 2017)*
- *7 Planning Steps for the Second Half of Life*, Pennsylvania State Education Association Central Region Pre-Retirement Conference (February 2017)
- *Making Use of Trusts for Asset Protection of the Middle Class*, Pennsylvania Bar Institute (January 2017)*
- *Importance of Retirement and Estate Planning*, Lycoming College's Institute for Management Studies (October 2016)
- *Succession Planning for Your Elder Law Client's Family Owned Business*, 19th Annual Elder Law Institute for the Pennsylvania Bar Institute (July 2016)*

- *4 Things You Need to Know to Prepare for the Second Half of Life*, Pennsylvania Association of School Retirees (June 2016)
- *Protecting the Net Egg: 4 Ways to Protect Your Retirement Funds*, Cashman Financial Group (Spring 2016)
- *Estate Planning In Pennsylvania's Shale Environment*, Pennsylvania Bar Institute (October 2015)*
- *What Every Elder Law Attorney Needs to Know about FLPs*, 18th Annual Elder Law Institute for Pennsylvania Bar Institute (July 2015)*
- *An Elder Law Attorney's Guide to Estate Planning for Oil, Gas & Mineral Rights*, 18th Annual Elder Law Institute for Pennsylvania Bar Institute (July 2015)*
- *The Myths & Truths of Estate Planning for Oil and Gas Interests,* 16th Annual Estate & Elder Law Symposium for Pennsylvania Bar Institute (February 2015)*
- *A Fresh Look at FLPs*, Pennsylvania Bar Institute (January 2015)*
- *CPA Tax Update Seminar*, Tax Pro Seminars (December 2014)**
- *Tax Law Update for 2014*, The Million Dollar Solution, tele-seminar (December 2014)
- *Legal Writing Workshop*, Pennsylvania College of Technology (November 2014)
- *What's Cooking with FLPs?*, 21st Annual Estate Law Institute for Pennsylvania Bar Institute (November 2014)*
- *Estate Planning for Clients Who Own Gas, Oil & Mineral Rights*, 17th Annual Elder Law Institute for Pennsylvania Bar Institute (July 2014)*
- *Savvy Social Security Planning*, Cioffi Wealth Management (Spring 2014)
- *Trusts and Taxation*, The Million Dollar Solution (Las Vegas, February 2014)
- *Myths and Truths About Planning in the Second Half of Life: 4 Truths Every Financial Advisor Should Know About Planning*, GBU Financial Life (Spring 2013)
- *The Facts: Special Needs Planning in 2013*, Association for Continuing Legal Education (Spring 2013)
- *What's in Your Closet? How Trusts Fit into Estate Planning*, DeJesus & Wethebee, accounting firm in Perkasie, Pennsylvania (December 2012)
- *Super Tips for Tax Season 2013*, Association for Continuing Legal Education (December 2012)

*attorneys received CLEs for the course
**accountants received CEs for the course

AWARDS

- 2022 Rising Star for Superlawyers
- 2023 Rising Star for Superlawyers

EDUCATION

SOUTHERN METHODIST UNIVERSITY DEDMAN SCHOOL OF LAW Dallas, TX
Master of Laws (LL.M.) in Taxation, May 2009

- Robert Hickman Smellage, Sr. Scholarship recipient awarded to a worthy student who has graduated from a law school and enrolled in a postgraduate program at the Dedman School of Law
- Relevant coursework: Estate and Gift Taxation, Corporate Taxation, Tax Practice and Professional Responsibility, Tax Accounting, Advanced Corporate Taxation, Partnership

Taxation, Estate Planning, Tax and Fiscal Policy, Taxation on Deferred Compensation, State and Local Taxation, and Employee Benefits and ERISA Law

REGENT UNIVERSITY SCHOOL OF LAW Virginia Beach, VA
Juris Doctor, May 2008

- Regent Journal of International Law: *Managing Editor*
- Volunteer Income Tax Assistance Program
- Relevant coursework: Individual Federal Income Tax, Estate and Gift Tax, Corporate Tax, and Estate Planning

PENN STATE UNIVERSITY University Park, PA
B.A. (Journalism), December 2004

- Minor in Nutrition
- Dean's List
- National Society of Collegiate Scholars

ORGANIZATONS & MEMBERSHIPS

- Admitted to Pennsylvania Bar (2008)
- Member of Lycoming Bar Association (2010-Present)
- Member of Pennsylvania Bar Association (2010-Present)
- Member of Wealth Counsel (2010-Present)
- Member of the Elder Law Section of the Pennsylvania Bar Association (2010-Present)
- Member of Northcentral Pennsylvania Estate Planners Council (2011-2018)
- Member of 2012 Leadership Lycoming Class
- Admitted to United States Supreme Court (2013)
- Member of National Academy of Elder Law Attorneys (2013-Present)
- Member of Pennsylvania Association of Elder Law Attorneys (2013-Present)
- Accredited with the Department of Veterans Affairs (2014-Present)
- Member of Franklin County Bar Association (2017-Present)
- Council Member for the Elder Law Section of the Pennsylvania Bar Association (2017-Present)
- Member of the Real Property, Probate & Trust Law Section of the Pennsylvania Bar Association (2017-Present)
- Member of the Greater Waynesboro Area Chamber of Commerce (2020-Present)
- Member of the Solo & Small Firm Section of the Pennsylvania Bar Association (2020-Present)
- Treasurer for the Elder Law Section of the Pennsylvania Bar Association (2021-Present)
- Member of the Joint Task Force for the Real Property, Probate & Trust Law Section and the Elder Law Section of the Pennsylvania Bar Association (regarding remote execution of documents) (2021-Present)
- Member of the Estate Planning Council of Central Pennsylvania (2022-Present)