

Kevin D. Birkhead

Associate

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Someone is sitting in the shade today because someone planted a tree a long time ago. -- Warren Buffett



Kevin was elected a partner of the firm effective January 1, 2019. His practice focuses on trusts and estates, business law and taxation.

He assists individuals and families with estate planning, working to design and implement wills, trusts and powers of attorney, and represents executors, trustees and beneficiaries in connection with probate and trust administration. He works collaboratively to understand each client's unique objectives and achieve those goals with tax efficiency. Kevin also works with business owners to plan for the succession of company ownership while accounting for taxation and business continuity.

Kevin assists with the legal and tax aspects of business transactions, including organization of new companies and subsidiaries, secured and unsecured financing, commercial contracts, and structuring asset purchase and stock purchase transactions, mergers, joint ventures and other capital transactions. He frequently represents individual and business clients with residential and commercial real estate transactions, leases, and community association issues.

Kevin has been named a *Super Lawyers* Rising Star in Estate & Probate Law from 2014 to the present, and regularly blogs and presents on matters of interest in estate and business law.

Kevin holds a Master's Degree in Taxation from Temple University School of Law, where he received the Faculty Award for Graduate Taxation. He lives in Bucks County with his wife, Rose, and their two children, Patrick and Shannon.

Areas of Practice

- Business, Corporate and Tax Law
- Commercial and Civil Litigation
- Real Estate and Zoning Law
- Wills, Trusts and Estates Law

Bar Admissions

- Pennsylvania, 2008
- New Jersey, 2008

Education

- Temple University School of Law, LL.M., Taxation, with distinction, 2015
- Rutgers University School of Law-Camden, J.D., *magna cum laude*, 2008
- Saint Joseph's University, B.S., Business Administration, 2003

Kevin D. Birkhead

Representative Matters

- Estate of Edward Winslow Taylor Inter Vivos Trust, 2017 PA Super 275, 169 A.3d 658

Published Works

- Estate Planning in Pennsylvania, Fourth Edition, PBI Press, 2016

Classes/Seminars Taught

- "Legal Issues for Small Businesses," Veterans Entrepreneurial Jumpstart Program, St. Joseph's University Veterans Services, 2018
- "New Federal Rules to Report Beneficiary Cost Basis – Form 8971," Estate Law Institute, Pennsylvania Bar Institute, 2017
- "Taxes and Business Strategy," Veterans Entrepreneurial Jumpstart Program, Saint Joseph's University Veterans Services, 2016 and 2017
- "Estate Accountings; Formal or Informal?," Montgomery County Estate Planning Council, 2017
- "Taxes and Business Strategy," Entrepreneurship Bootcamp for Veterans with Disabilities, Saint Joseph's University Veterans Services, 2016 and 2017
- "Closing the Estate: Settlement Agreement or Court Approval," Estate & Elder Law Symposium, Pennsylvania Bar Institute, 2016
- "Interaction Between Fiduciary Accounting Income, Trust Taxable Income and Distributable Net Income," Pennsylvania Bar Institute, 2015
- "How to Prepare Fiduciary Accounts & Avoid Common Traps," Pennsylvania Bar Institute, 2014
- "Business Succession Planning," Panelist for Society of Financial Service Professionals - University Partners Program, Saint Joseph's University, 2013