



Kimberly E. Stein

Partner

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Clients benefit from Kim's experience in all aspects of trust and estate planning and administration. In her practice, she advises individuals, fiduciaries, family groups, and business and charitable organizations on matters relating to estate and retirement planning; individual, fiduciary, and corporate income and transfer tax matters and controversies; trust and estate administration; and formation, qualification, and ongoing compliance of charitable organizations. She also develops tax planning strategies for clients and strives to reduce, defer, or eliminate the imposition of transfer taxes in connection with estate planning goals. In recognition of her skill in handling complex trusts and estate matters, Kim has been named to the *Best Lawyers*® list for Trusts and Estates and Tax Law.

Education

- University of Rochester (B.A., *magna cum laude*, 2004)
- Cornell Law School (J.D., 2008)

Bar Admissions

- Ohio
- Florida
- U.S. Tax Court

Professional Affiliations

- Cleveland Metropolitan Bar Association (*Estate Planning, Probate and Trust Law Section; Section Officer, 2011-2015, including Chair, 2014-2015; Member and Council of Delegates, 2008-present*)
- Estate Planning Council of Cleveland (*Member, 2008-present; President, 2023-2024; Board Member, 2018-present; Executive Committee, 2019-present*)
- National Association of Estate Planners & Councils (*Accredited Estate Planner*®, 2022)
- Tax Club of Cleveland
- Uniform Law Commission on Conflict of Laws in Trusts and Estates (*Observer, 2020-present*)

Practices & Industries

- Trusts & Estates
- Tax
- Business Succession Planning
- Fiduciary Services
- Business Law

- Ohio State Bar Association (*Member, Estate Planning, Trust and Probate Law Section; Taxation Committee; Women in the Profession Section*)
- Florida Bar Association (*Real Property, Probate Law Section; Tax Law Section*)
- American Bar Association (*Real Property, Trust & Estate Law Section; Taxation Section*)

Community Involvement

- Anti-Defamation League, Ohio/Kentucky/West Virginia Region (*Board of Directors, 2012-present*)
- Jewish Federation of Cleveland (*Professional Advisory Council, 2017-present*)
- Gross Schechter Day School (*Board of Directors, 2019-present*)

Awards & Honors

- Ranked as one of Ohio's "Leaders in Their Field" in Private Wealth Law by Chambers High Net Worth Guide (2026)
- American College of Trust and Estate Council (*Fellow*)
- Named to the Ohio Super Lawyers list (2025; 2026)
- Named to *The Best Lawyers in America*, Tax Law; Trusts and Estates (2024-2026)
- Named to the *Best Lawyers Ones to Watch*, Trusts and Estates, Tax Law (2021-2023)

Experience

- Plans and implements complex estate planning strategies by constructing wills, revocable and irrevocable trusts, and corporate entities tailored to the particular needs and goals of each client and their family.
- Counsels individuals and families in structuring various methods of achieving wealth transfer and charitable goals, while mitigating federal estate, gift, generation skipping transfer, and income tax consequences.
- Assists in structuring and implementing business succession plans to prepare for effective operational and governance transitions balanced with economic and lifestyle priorities.
- Formulates various estate planning arrangements including asset protection and probate avoidance techniques for clients tailored to their specific needs.
- Plans, administers, and advises on creation and strategic implementation of gratuitous and commercial transactions with attention to federal estate, gift, and generation-skipping transfer tax and federal and state personal, trust, partnership, and corporate income tax ramifications and reporting obligations.
- Assists corporate and individual fiduciaries in connection with the creation, funding, and ongoing administration of multigenerational, split-interest, and special purpose trusts.
- Advises on tax compliance and other reporting regarding individual, entity, and fiduciary income tax, federal estate, gift, and generation-skipping transfer tax returns, charitable organization informational and income tax returns, and related government filings.
- Establishes and advises in the administration of tax-exempt organizations.
- Advises fiduciaries and beneficiaries in *cy pres* and other judicial proceedings, private

settlement agreements, and decanting transactions to modify or terminate irrevocable trusts.

- Represents fiduciaries in probate and estate administration proceedings.

News & Media

July 23, 2026

UB Greensfelder Trusts & Estates Practice and Attorneys Recognized in Chambers High Net Worth Guide 2026

August 21, 2025

UB Greensfelder Attorneys Recognized in The Best Lawyers in America® 2026 List

December 17, 2024

Ohio Super Lawyers Recognizes 57 UB Greensfelder Attorneys in 2025

August 15, 2024

UB Greensfelder Attorneys Recognized in The Best Lawyers in America® 2025 List

August 17, 2023

Ulmer Attorneys Recognized in The Best Lawyers in America® 2024 Report

November 29, 2022

Ulmer Partner Kimberly E. Stein Elected as American College of Trust and Estate Counsel Fellow

August 18, 2022

Ulmer Attorneys Recognized in The Best Lawyers in America® 2023 Report

June 13, 2022

Ulmer Expands Trusts & Estates Practice With Two Top-Notch Hires