



# Michelle Chapin

## Principal (She/Her)

301-986-0233

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It has been a pleasure working with you over the years.

I will be transitioning to Lerch, Early & Brewer effective May 1, 2023.

For new and existing clients, you can contact me using the updated information above.

Thanks again and I look forward to continuing our work together.

### PRACTICE AREAS

Estate Planning

Estate & Trust Administration

Corporate

Tax: Individual

Tax: Business

### BAR ADMISSIONS

Maryland

District of Columbia

Virginia

United States Supreme Court

### EDUCATION

LL.M. in Taxation, *With Distinction*, Dean's List, Georgetown University Law Center, 2011

Certificate in Estate Planning, *With Distinction*, Dean's List, Georgetown University Law Center, 2011

J.D., American University, Washington College of Law, 2005

B.A., *With Honors*, University of Florida, 2002

### ACCOLADES & AWARDS

"Top Financial Professional," *Bethesda Magazine* (2022)

Maryland *Super Lawyers* (2022-2023)

Best Lawyers in America - *Best Lawyers* (2020-2023)  
- Trusts and Estates

"Top Financial Advisers - Estate Attorneys," - *Washingtonian* magazine (2019, 2021, 2022)

"Top Attorneys," - *Bethesda Magazine* (2019, 2021)  
- Trusts and Estates

"Top Lawyers" - *Washingtonian* magazine (2018, 2020, 2022)

"Top Estate Lawyers (Rising Stars)" - *Bethesda Magazine* (2018)

"Washington's Best Lawyers," Trusts and Estates, *Washingtonian* magazine (2017)

Best Law Firms – *U.S. News & Best Lawyers*  
- Tier 2 National Ranking for Trusts & Estates  
- Tier 1 Metropolitan (D.C. area) Ranking for Trusts & Estates

Maryland *Super Lawyers* "Rising Stars" (2014-2020)

Washington D.C. *Super Lawyers* "Rising Stars" (2014-2020)

Graduate of Class I of the ACTEC Mid-Atlantic Fellows Institute  
(2019-2020)

AV Preeminent® Peer Review Rated

## IN THE NEWS

Eight Paley Rothman Attorneys Named in the *Washingtonian's* 2022 Top Lawyers List

14 Paley Rothman Attorneys Named to the 2023 Maryland Super Lawyers and Rising Stars Lists

Paley Rothman Earns National and Local Honors in U.S. News "Best Law Firms" 2023 Rankings

19 Paley Rothman Attorneys Selected 2023 Best Lawyers® in America

Michelle Chapin Named a 2022 *Bethesda Magazine* Top Financial Professional

Paula Calimafde, Jeffrey Kolender, and Michelle Chapin Named 2022 *Washingtonian* Top Financial Advisers for the Third Consecutive Time

Three Paley Rothman Attorneys Were Selected to *Washingtonian's* Top Financial Advisers list for 2021

Six Attorneys Named "Top Lawyers" by *Washingtonian Magazine* - December 2020 Issue

Twenty Paley Rothman Attorneys Selected to 2021 Best Lawyers in America

Glenn Cooper Top 10, 14 Paley Rothman Attorneys Named to the 2020 Washington D.C. Super Lawyers and Rising Stars Lists

14 Paley Rothman Attorneys Named to the 2020 Maryland Super Lawyers and Rising Stars Lists

Six Attorneys Listed in *Washingtonian's* December 2019 Edition

Seventeen Paley Rothman Attorneys Selected to 2020 Best Lawyers in America

Michelle Chapin Elected Shareholder and Jessica Summers Named Principal at Paley Rothman

6 Paley Rothman Attorneys Named "Top Lawyers" by Washingtonian Magazine

3 Paley Rothman Attorneys Listed in Bethesda Magazine's Top Estate Lawyers

3 Paley Rothman Attorneys Named to "Best Lawyers" List by Washingtonian

Michelle Chapin, Tracey Coates and Kevin D'Anna Named Principals of Paley Rothman

Michelle Chapin Appears on the Wall Street Journal's Watching Your Wealth Podcast

Michelle Chapin Presents at Seminar on "Medicaid and Elder Law in Maryland"

Michelle Chapin Presents Estate Planning Seminar to Leisure World Residents

Michelle Chapin Presents to Achievement Rewards for College Scientists Foundation, Inc.

Michelle Chapin Presents to Rockville Senior Center

Michelle Chapin Presents to Tax Section Meeting of the Greater Washington Society of CPAs

Paley Rothman Launches Estate Planning Webcast

Paley Rothman Hires Michelle Chapin as an Associate

## RECENT PUBLICATIONS

Author - "(Un)Enforceability of Arbitration Clauses in Maryland Trusts," *Maryland State Bar Association Estate & Trust Law Section Volume 29 Issue 1* (2023)

Editor/Contributor – "Using & Drafting Trusts in Estate Planning," *Maryland State Bar Association CLE Publication* (2023 Revised Edition)

"Seven Considerations for Selecting a Guardian Under a Will," *MSBA Bar Bulletin*, April 2015

## CIVIC & COMMUNITY INVOLVEMENT

### **Washington D.C. Estate Planning Council**

- Director (2022- Present)
- Professional Development Committee - Co-Chair (2019-present)
- Program Committee - Co-Chair (2016-2019)
- Golf Tournament Committee (2014-2016)

### **International Society of Trust and Estate Practitioners (STEP-USA)**

- Member

### **Fairfax County Bar Association**

### **Montgomery County Bar Association**

Serves as a mentor for law school students at Georgetown University Law Center and American University Washington College of Law looking to develop an estate planning practice

## SPEECHES AND PRESENTATIONS

"Irrevocable Life Insurance Trusts," MSBA's presentation: *Using & Drafting Trusts in Estate Planning*, January 2023

"Pre-Retirement Planning Series - Estate Planning for U.S. and Non-U.S. Citizens," World Bank Pre-Retirement Series, multiple presentations annually

"Critical Issues in Estate Planning," Speaker, *Georgetown University*, June 2022

"Of Art and Science: Valuations in the Time of Covid-19 and Beyond" Moderator, *Washington- D.C. Estate Planning Council*, February 2022

"Estate and Tax Planning in Uncertain Times," Georgetown University Law Center, October 2019

"Inheriting Your Parents' Assets," *Move or Improve with Debbie* Podcast, September 2019

"Tips, Tricks and Pitfalls when Representing an International Client," MSBA Estate & Trust Study Group, April 18, 2019

"Estate Planning After a Divorce," *The Divorce Chronicles* Podcast, February 2019

"The New Tax Law and Its Implications on Charitable Giving," Washington English Center, October 2018

"International Mystery: Unlocking the Secrets to Tax Efficient Trust Structures For Non-U.S. Persons," STEP Mid Atlantic, September 2018

"Recent Estate, Gift and GST Tax Changes and Planning Considerations for the International Client," Greater Society of CPAs, May 2018

"International Mystery - Unlocking the Secrets to Tax Efficient Trust Structures for Non-U.S. Persons," Maryland State Bar Association's Advanced Estate Planning Institute, May 2018

"Estate Planning General Session, Estate & Gift Taxes for Non-U.S. Citizens and U.S. Citizens with Non-U.S. Citizen Spouses," World Bank Pension Department Pre-Retirement Seminar, October 2017

"Women in the Building Industry Lunch & Learn: Estate Planning with Michelle Chapin," NVBIA, August 2017

"DIY Pitfalls of Estate Planning," Rotary Club of Potomac-Bethesda, August 2017

"Juggling Three Jurisdictions: Estate Planning Differences in DC/MD/VA," Wills, Trusts & Estates Section Meeting, Fairfax Bar Association, April 2017

"Special Needs Estate Planning," Autism Speaks, Transition Planning Town Hall, December 2016

"Tax and Estate Planning Seminar for G-4 Visa Holders," International Monetary Fund Family Association, November 2016

"Juggling Three Jurisdictions: Estate Planning Differences in DC/MD/VA," DC Bar, October 2016

"Transfer Tax Planning for Non-citizens and Multinationals," National Capital Chapter Society of Financial Service Professionals, October 2016

"Estate Planning General Session, Estate & Gift Taxes for Non-U.S. Citizens and U.S. Citizens with Non-U.S. Citizen Spouses," World Bank Pension Department Pre-Retirement Seminar, June 2016

"What Every Parent Needs to Know About Estate Planning," Robert E. Simon, Jr. Children's Center, March 2016

"2014 Legislative Changes for Estate Tax Law," Paley Rothman Estate Planning Webcast, December 2014

"Basic Steps in the Estate Planning Process, Common Pitfalls and Why Everyone Can Benefit from a Professionally Prepared Estate Plan," Rockville Senior Center, October 2014

"An overview of your Estate Planning Documents and Charitable Giving," Metropolitan Washington Chapter of the Achievement Rewards for College Scientists Foundation, Inc. (ARCS), September 2014

"How to Communicate the Importance of Estate Planning to Your Clients in an Evolving Estate Tax Landscape," Greater Washington Society of CPAs, Tax Section, August 2014

"Important Changes to the Maryland Estate Laws," Leisure World, July 2014

"Medicaid and Elder Law in Maryland: Representing Clients in a New Legal Landscape," Lorman CLE Seminar, July 2014

"The Importance of a Well-Prepared Estate Plan," Leisure World, February 2014

## **MEDIA COMMENTARY**

"Election 2016: The Candidates on Paid Family Leave," *The Wall Street Journal's Watching Your Wealth* podcast, October 27, 2016