BRIGITT ORFIELD

Attorney
borfield@hensonefron.com | (612) 252-2816

"Being sincerely invested in you and having your best interests at heart is what fuels my passion for estate planning. It takes a personal approach to create a positive experience and that is the foundation of my practice."

ABOUT ME

I feel privileged to assist with your estate planning and grateful to be allowed into your life. Experiencing a variety of life events with clients builds trust, and I am proud of the long-standing relationships I have developed over the past 23 years.

I work closely with individuals and families to plan for the transfer of wealth during their lifetimes and upon death with the most favorable tax consequences. I accomplish this through the planning and drafting of:

- wills;
- revocable trusts;
- trusts for minors;
- irrevocable trusts;
- insurance trusts;
- cabin and vacation home trusts;
- charitable lead trusts and charitable remainder trusts;
- intentionally defective grantor trusts;
- qualified personal residence trusts;
- antenuptial, post-nuptial, and cohabitation agreements; and
- family limited partnerships and limited liability companies.

I also routinely assist families after the death of a loved one to steer them through the probate process, asset transfers, and death tax returns, to ensure that the client's carefully laid plans are properly executed.

I invest in knowing you from the start and take the time to learn about you and your core values. I am skilled at creating plans that balance these values with the legal and tax ramifications of transferring your assets. I explain things clearly and simplify what can seem like an overwhelming process. Dedicated to the importance of family, I enjoy navigating you and your loved ones through the estate planning process. I am known for exuding compassion, optimism, and energy, and as a result, I have happy and loyal clients.

CLIENTS SAY:

"Brigitt has a unique way of making complex and intimidating topics much simpler; she puts me at ease so I can focus on my goals."

"Brigitt is always a pure pleasure to work with—she's welcoming, relatable, easygoing, positive, and confident."

"When I am nervous, she calms me and lets me know all is well."

"It's more than a job to her; she really gets to know her clients and their families and relationships truly matter to her."

RESULTS

- Created multiple qualified personal residence trusts for clients to hold various vacation properties and then transfer those properties to the next generation with a significant discount in gift tax value
- Created charitable lead trust to hold the proceeds from the sale of a substantial family business to offset the income tax liability associated with the gain with a sizable charitable deduction
- Structured non-reciprocal spousal access trusts for clients to fully utilize their applicable exclusion amounts
- Worked with client to structure self-settled Alaska Trust
- Structured intentionally defective grantor trust (IDGT) to hold client's interest in land on which country music festival is held for the benefit of client's children; client is able to further reduce the value of his estate by continuing to pay the income tax associated with the trust
- Successfully drafted and negotiated numerous antenuptial agreements wherein client's interests in family and other business assets were protected and the inheritance of children from a first marriage were protected
- Established charitable foundation for client to support her charitable interests and involve her family in the process of selecting the charities to support
- Structured agreement whereby significant wealth was transferred to client's children via the use of short-term rolling grantor retained annuity trusts (GRATS) to transfer stock at a low value during the stock market collapse that subsequently doubled in value
- Established supplemental needs trust for child of wealthy clients to assist clients in supporting their child without disqualifying him from governmental benefits for which he is eligible
- Represented client in transferring ownership of apple orchard to heirs at a reduced gift tax value through the use of a limited liability company

SERVICES

Estate, Trust and Probate

- Business Succession Planning
- Estate and Trust Administration
- Estate Planning
- Gift and Estate Tax
- Guardianships and Conservatorships

Tax

- Tax-Exempt Organizations

CREDENTIALS

EDUCATION

- J.D., cum laude, William Mitchell College of Law, 1994
- B.A., University of St. Thomas, 1991
- CFP Professional Education Program, College for Financial Planning

BAR ADMISSIONS

- Minnesota

HONORS

- Selected for inclusion in Minnesota Super Lawyers–Rising Stars Edition 2004
- Staff member, William Mitchell Law Review

ADDITIONAL AREAS OF FOCUS

Antenuptial Agreements

Prenuptial, Postnuptial and Cohabitation Agreements

- Successfully helped clients to transfer valuable lake property to their heirs through the use of a cabin trust
- Protected multi-generational family business interests in complicated antenuptial agreement

ASSOCIATIONS

PROFESSIONAL

- American Bar Association, Real Property, Trust Estate Law Section
- Minnesota State Bar Association, Probate and Trust Law Section
- Hennepin County Bar Association

ADDITIONAL EMPLOYMENT

- Orfield & Petroski Law Firm, Attorney, 1994–1996
- Thrivent for Lutherans, Estate and Charitable Planning Specialist, 1996–1998

COMMUNITY

- Actively involved with Mission Haiti Inc., Minneapolis, Minnesota
- Volunteer at Annunciation Catholic School, Minneapolis, Minnesota

THOUGHT LEADERSHIP

ARTICLES

- Co-Author, "Taking a Step from Graduate to Grown-up: Estate Planning and Other Considerations for your Recent Graduate," Henson Efron Thought Leadership, June 18, 2018
- "Estate Planning in the Digital Age: Cryptocurrency and Digital Assets," Henson Efron Thought Leadership, May 14, 2018
- "Estate Planning for Lakeshore Property–Passing on the Fun to the Next Generation," Outdoor News, March 22, 2002
- "IRS Pulls the Plug on Charitable Split Dollar Life Insurance," Advanced Marketing Review, Lutheran Brotherhood, October 1999
- "American Council on Gift Annuities Publishes New Rate Schedule," Advanced Marketing Review, Lutheran Brotherhood, October 1999
- "IRS Issues New Mortality Tables Applicable to Split-Interest Gifts," Advanced Marketing Review, Lutheran Brotherhood, October 1999
- "Charitable Strategies Manual for Clients, Congregations, and Institutions," Lutheran Brotherhood, 1997
- "Charitable Remainder Trusts: IRS Releases Proposed Regulations," Advanced Marketing Review, Lutheran Brotherhood, August 1997
- "Primer: Taxpayer Relief Act of 1997," Lutheran Brotherhood, August 1997
- "To Give or Not to Give: Problems with Making Charitable Gifts of Certain Assets," Advanced Marketing Review, Lutheran Brotherhood, April 1997
- "Building Credibility in the Charitable Marketplace," Leader, Lutheran Brotherhood, April 1997
- "Identifying Charitable Prospects: You Might be Surprised Who You Find," Leader, Lutheran Brotherhood, December 1996
- "NIMCRUT: More Than Just a Funny Name," Leader, Lutheran Brotherhood, November 1996
- "Making Big Donors Out of Young Adults: Three Simple Ways," Leader, Lutheran Brotherhood, October 1996
- "The Perks of Charitable Life Insurance," Focus, Lutheran Brotherhood, Fall/Winter 1996

PRESENTATIONS

- "Estate Planning for Mid-Career Professionals," Fort Snelling, January 2008
- "Estate Planning for the Sages of our Parish," Annunciation Church, November 2005
- "Charitable Giving in the Business Market," Lutheran Brotherhood Career III Estate and Charitable School October 16, 1999, February 23, 1998, October 15, 1997, April 23, 1997, Minneapolis, Minnesota
- "Estate Planning Strategies," Mauritsen Agency Estate Strategies Client Seminar, October 16, 1998, Spokane, Washington
- "The Estate and Charitable Markets," Johnson Agency Meeting, September 17, 1998, Kissimmee, Florida
- "Educational Incentives: How to Tap into the Young Adult Market," Lutheran Brotherhood Passport '98, June 24, 1998, Bethany, Kansas, and June 15, 1998, Selinsgrove, Pennsylvania
- "Getting Started in the Estate and Charitable Markets," Dungan Agency Boot Camp, May 8, 1998, Allentown, Pennsylvania
- "Charitable Consortium at Lutheran Brotherhood," May 4, 1998, Minneapolis, Minnesota
- "Charitable Strategies," Reimet Agency Meeting, April 24, 1998, Philadelphia, Pennsylvania
- "Creating and Growing Endowments," Pastor Seminar, April 23, 1998, Flourtown, Pennsylvania
- "Charitable Giving Tools," Lutheran Brotherhood Career II School, April 1, 1998, November 14, 1997, Minneapolis, Minnesota
- "What's New in the Estate and Charitable Markets," Lutheran Brotherhood Career III Estate and Charitable School, February 23, 1998, October 13, 1997, Minneapolis, Minnesota
- "Nuts and Bolts of Planned Giving," Lutheran Community Foundation School, November 16, 1997, Minneapolis, Minnesota
- "Estate Protection and Charitable Giving Basics," Lutheran Brotherhood Career III Estate and Charitable School, October 13, 1997, Minneapolis, Minnesota
- "Resources Available in the Estate and Charitable Markets," Lutheran Brotherhood Career III Estate and Charitable School, October 12, 1997, Minneapolis, Minnesota
- "Endowments," Lutheran Brotherhood Career III Estate and Charitable School, October 13, 1997, Minneapolis, Minnesota
- "Faith Lutheran Church Endowment Charitable Giving Seminar," Faith Lutheran Church, May 2, 1997, Coon Rapids, Minnesota
- "Charitable Giving in 1997: A Track to Success," Lutheran Brotherhood Career II School, March 21, 1997, Minneapolis, Minnesota
- "Charitable Strategies," Lutheran Community Foundation School, March 1997, October 1996, Minneapolis,

Minnesota

- "Estate and Charitable Strategies and Topics," Hansen Agency Meeting, February 21, 1997, Mosinee, Wisconsin
- "Estate and Charitable Planning Seminar," Hansen Agency Client Seminar, February 20, 1997, Mosinee, Wisconsin
- "Charitable Giving in 1996: A Track to Success," Lutheran Brotherhood Career II School, November 1996, Minneapolis, Minnesota