

KELLY J. ZECH

Attorney, Associate

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"I believe that the heart of estate law is people. My desire to see my clients succeed drives me to empathetically understand their current needs, future goals, and create a customized estate plan to get them there."

SERVICES

Estate, Trust and Probate

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

CREDENTIALS

EDUCATION

• J.D., University of Minnesota Law School, 2022 - Business Law Concentration

- 2022 Mondale Hall Engagement Award Recipient
- Managing Editor, Minnesota Law Review
- Dean's List
- "Top Performer" for 1L Law in Practice Section
- Minnesota Tax Court, Legal Extern for Judge Jane Bowman (2022)
- Business Law Clinic, Student Attorney (2021)
- President, Business Law Association; President, Law School Armed Forces Association
- B.S. in Business – Management Information Systems, B.S. in Business – Entrepreneurial Management, magna cum laude, University of Minnesota, 2005
- President's Distinguished Scholarship Recipient
- Thomas E. Leary Scholarship Recipient
- Naval Reserve Officer Training Corps Scholarship Recipient

BAR ADMISSION

- Minnesota

PAST EMPLOYMENT

- Surface Warfare Officer, U.S. Navy, serving primarily in Operations and Navigation roles

ABOUT ME

Creating a customized estate plan requires diligent planning and preparation. It doesn't happen without taking care to develop long-term, trusted relationships with my clients. That's the foundation of my approach, and it ensures I understand my clients' current needs and future goals.

The estate planning process requires a relationship of trust between an attorney and their client due to the inherently personal nature of the information that must be shared. I will compassionately listen as you explain your values, concerns, and intentions to me, and I will create an estate plan that preserves your legacy and goals. Should you be charged with administering an estate, trust, or acting as a guardian or conservator, I will provide clarity, insight, and help chart a course that makes the complex simple. Should there be a dispute, I will be a strong advocate representing your interests.

My key strengths are engaged listening, thoughtful planning, and meticulous legal writing and research, which I bring into my work in estate planning matters, as well as estate and trust administration matters, including:

- estate planning (wills, trusts, powers of attorney, and health care directives)
- probate and trust administration
- charitable gift and legacy planning
- business succession planning
- state and federal gift and estate tax law
- guardianship, conservatorship, and elder law planning
- special needs and supplemental need trust planning

My career and experiences in government and for the Navy, including as an Operations Officer and Navigator while on active duty; President of both the Business Law Association and Law School Armed Forces Association while at the University of Minnesota Law School; and NROTC Battalion Operations Officer and Public Affairs Officer while at the University of Minnesota, Carlson School of Management, were engaging and rewarding. While serving in the Navy, ensuring my sailors had completed estate plans was an essential step for pre-deployment preparation and inspired me to practice in estate planning.

Today, I carry forward my passion for helping people plan for the future. I want to equip my clients with the strategies and tools necessary to help meet their goals and needs, including having the peace of mind that comes with a well-drafted estate plan or a partner in law beside them after a loss.

CLIENTS SAY:

"Kelly is one of the most hardworking people I've ever met. Her tenacity, coupled with her ability to stay focused and calm during stressful situations, makes her a wonderful person to have in your corner."

"Kelly is able to navigate complex and nuanced areas of law and explain them in easy-to-understand terms."

"Kelly's steadfast diligence and commitment to doing the job right are just a few reasons why I recommend her to everyone I know."

"Kelly is a mission-focused, dedicated professional who knows exactly how to get the job done. She understands what is required for detailed planning and examining a problem from every angle. She is often my first phone call when I have a challenge to resolve."

"Kelly's competence, dedication, and discipline are tools she uses to make obscure and difficult situations clear. I trust her implicitly."

ASSOCIATIONS

PROFESSIONAL

- Minnesota State Bar Association
- American Bar Association
- Minnesota Women Lawyers
- Minnesota Navy League

THOUGHT LEADERSHIP



HENSON EFRON

ARTICLES

- Co-Author, "Minnesota Court of Appeals Holds that Guardians have Broad Immunity from Negligence Claims," Henson Efron Thought Leadership, September 2022