



## ERICA WILLIAMS

PARTNER



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Erica K. Williams brings more than 25 years of comprehensive and sophisticated estate planning services to high net-worth individuals and families. She earned the designation as an Accredited Estate Planner® (AEP®) by the National Association of Estate Planners & Councils, awarded to estate planning professionals who meet stringent requirements of experience, knowledge, education professional reputation, and character.

Erica is experienced in all aspects of tax planning, including:

- Income tax
- Estate tax
- Gift tax
- Generation-skipping transfer tax
- Charitable Contributions

Erica assists clients with family and business succession planning and drafting of wills, trust agreements, powers of attorney, and associated documents. She helps clients understand complicated tax issues by providing analysis and strategies regarding the use of annual gift tax exclusion amounts, grantor trusts (the individual who creates the trust is treated as owning the assets for income tax, but not estate tax, purposes), spousal lifetime access trusts, asset protection trusts, life insurance trusts and charitable lead and remainder trusts. Erica also provides guidance to executors and trustees in the administration of estates and trusts.

Erica's Greater Cleveland area clients confer with her virtually, as well as in-person at Hahn Loeser's downtown Cleveland office or at the Westlake, Ohio office which opened in April 2022.

### *Publications & Speaking Engagements*

- Speaker, "Opportunities & Challenges for Women." Northern Ohio Charitable Gift Planners, 29th Annual Planned Giving Day. September 24, 2020.
- Author, "Estate Planning Series – Estate and Gift Tax Reform. Part 3: The Proposals for Estate and Gift Tax Reform Have Begun: Analysis and Considerations Regarding Annual Gift Tax Exclusion." May 19, 2021.
- Author, "Estate Planning Series – Estate and Gift Tax Reform. Part 2: The Proposals for Estate and Gift Tax Reform Have Begun: Analysis and Considerations Regarding Grantor Trusts." April 28, 2021.
- Author, "Estate Planning Series – Estate and Gift Tax Reform. Part 1: The Proposals for Estate and Gift Tax Reform Have Begun: Analysis and Considerations Regarding Lower Exemption Amounts." April 14, 2021.



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- Author, "Women's History Month: Florence Ellinwood Allen – First Woman Elected to a Judicial Office in the United States." March 29, 2021.

#### *Admissions*

- State of Ohio.
- U.S. District Court of Northern District of Ohio.

#### *Education*

- Case Western University School of Law, J.D., 1996.
- Fordham University, B.A. in Political Science, 1992.

#### *Memberships & Affiliations*

- Cleveland Metropolitan Bar Association: Member, Probate & Trust Law Section; Council of Delegates.
- The Lawyers Guild of The Catholic Diocese of Cleveland, Member.
- Ohio State Bar Association, Member.
- Lorain County Bar Association, Member.
- National Association of Estate Planning Planners and Councils, Member.
- Estate Planning Council of Cleveland, Member.

#### *Awards & Distinctions*

- Ohio Super Lawyers® Rising Star, 2005-2007, 2009.

#### *Accreditations*

- *Accredited Estate Planner*® (AEP®) by the National Association of Estate Planners & Councils.