Katherine A. McAllister

Partner

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Overview

Katherine "Katie" McAllister counsels high net worth individuals and families on estate planning, estate administration and trust administration. She advises private clients on the design and implementation of tax-efficient estate plans that further their personal and financial objectives. Katie assists clients with all aspects of the estate administration and probate process, including representation of fiduciaries and beneficiaries in probate proceedings and preparation and filing of federal and state estate and gift tax returns.

Education and Credentials

Education

Boston College Law School, J.D., *magna cum laude*, Order of the Coif, Articles Editor, *Boston College Law Review*

Williams College, B.A., *cum laude*

Admissions

State of Connecticut

Commonwealth of Massachusetts

State of New York

Affiliations

Connecticut Bar Association, Estates & Probate, Young Lawyers Section

Connecticut Supreme Court Historical Society

Fairfield County Bar Association

Recognition and Community

No aspect of this advertisement has been approved by the highest court of any state. Prior results do not guarantee a similar outcome. See Awards Methodology.

Practices & Industries

Private Client

Trust & Estates

Recognitions

Selected to the list of Ones to Watch for Trusts and Estates by *The Best Lawyers in America* (Woodward/White, Inc.), 2021-2025

Selected to the list of Connecticut and New England *Super Lawyers* Rising Star (Thomson Reuters), Estate Planning & Probate, 2016-2022

Insights

Women Working Together Hosts Holiday Dinner for Stamford Women's Shelter
December 9, 2024

News

Eleven Day Pitney Attorneys Elevated to Firm Partnership for 2023
January 3, 2023

Katherine A. McAllister
January 3, 2023

Katherine McAllister Graduates from Class I of the ACTEC New England Fellows Institute
September 21, 2022

In The Media

"Intro to Gift Tax Return Preparation," Connecticut Bar Association Estates and Probate Section
September 26, 2024

"Handling Estate Closing, Final Accounting and Tax Returns," National Business Institute
June 6, 2023

Day Pitney Promotes Two Connecticut-based Attorneys
New Haven Biz, January 6, 2023

Day Pitney Elevates 11 To Partner
Law360 Pulse, January 3, 2023

New Partners Kick Off New Year at Connecticut Firms
Connecticut Law Tribune, January 5, 2023

Eleven Day Pitney Attorneys Elevated to Firm Partnership in 2023
The Boca Raton Tribune, January 4, 2023

"Introduction to Trusts and Estates: The Marital Deduction, Credit Shelter Planning and Portability," The Tax Conference
NYU School of Professional Studies and the Division of Programs in Business, July 27, 2021

COVID-19 and Remote Execution of Estate Planning Documents Presentation at Estate Planning Council of Lower Fairfield County
June 17, 2020

Marshalling Assets Seminar
NBI, Inc., December 16, 2019

Cryptocurrency - Estate and Charitable Planning and Compliance
Trust & Estates Magazine, January 1, 2019

Charitable Trusts
Trusts from A to Z, NBI, Inc. , June 4, 2018

Charitable Gifts - Watch Your Step! Diversification, Substantiation, Procrastination Presentation at Federal Tax Institute of New England
November 10, 2017

Diversifying Charitable Remainder Trust Investments
Trust and Estates Magazine, October 1, 2017

Trusts Used for Tax Reduction
Trusts 101, NBI, Inc. , August 15, 2017

Legal Underpinnings for Formulating and Defending Estate Plans
Trusts and Estates Magazine, January 1, 2016

A Distinction Without A Difference? ERISA Preemption and The Untenable Differential Treatment Of Revocation-On-Divorce and Slayer Statutes
52 B.C.L. Rev. 1481, January 1, 2011