

Kiran Uppal

Partner

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Kiran helps clients articulate their wealth transfer objectives and implement plans in a manner that meets their financial, familial, and business goals in a tax-efficient manner.

Kiran advises on a broad range of income and transfer tax planning strategies for individuals and families with established wealth, including the implementation of planning related to Qualified Small Business Stock. Her key clients include entrepreneurs and principals of private equity and hedge funds, shareholders of public and private corporations, as well as owners of closely held businesses.

To accomplish her clients' goals, Kiran advises on all aspects of estate and trust related matters, including the creation of irrevocable trusts and family entities, the modification of trusts through decantings and nonjudicial settlement agreements, analyzing estate, gift, and generation skipping transfer tax planning strategies, charitable planning, including the creation of charitable trusts and private foundations, and advising on probate proceedings and trust administration matters.

Kiran also has extensive experience advising family offices and private trust companies with respect to governance, beneficiary relations, and administration. Kiran frequently analyzes regulatory compliance issues facing private trust companies and helps clients develop policies and procedures in light of such regulations. The ongoing relationships that she builds with her families and their private entities allows her to help develop strategies that both accomplish shared family goals and account for individual needs and circumstances.

Professional Affiliations

- Member, American Bar Association, Taxation Section, Real Property, Trust and Estate Law Section, Business Planning Group
- Member, Washington State Bar Association, Real Property, Probate and Trust Section

Education

- Georgetown University Law Center (LL.M., Taxation, 2014)
- Seattle University School of Law (J.D., 2013)
 - CALI Excellence for the Future Award: Trusts and Estates Clinic; Estate Planning; Kaplen Foundation Scholarship
- University of Washington (B.A., Political Science, 2008)

Bar Admissions

- District of Columbia
- Illinois
- Oregon
- Washington

Languages

- Punjabi

Additional Information

- “Incapacitated Settlers: Trustee Duties, Planning Options, and More”, ISBA Trusts and Estates Section, Webinar, September 2021
- “Construing and Modifying Wills and Irrevocable Trusts,” (chapter co-author) Litigating Disputed Estates, Trusts, Guardianships and Charitable Bequests, 2020