

Jeanne E. Longsworth
Longsworth Law LLC

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Primary Experience: Jeanne concentrates her practice in the areas of wealth transfer and preservation planning, business succession planning and estate administration. She counsels business owners, corporate executives, physicians and other individuals and families to formulate and achieve financial objectives. Jeanne appreciates that each client's circumstances and objectives are unique and endeavors to genuinely understand each client's uniqueness and then tailor a plan particularly suited to fulfilling the client's objectives. A substantial part of Jeanne's practice includes preparing wills and trusts; evaluating and establishing lifetime gift programs to manage and reduce taxes; counseling on the use of irrevocable life insurance trusts for estate liquidity problems; evaluating and structuring closely-held business transfer solutions; and crafting donor advised fund agreements and organizing private foundations to fulfill philanthropic plans and expectations. Jeanne also represents fiduciaries of all types, including personal representatives of substantial and complex estates and individual and corporate trustees, before local courts and federal and state taxing authorities.

Jeanne opened Longsworth Law LLC in 2007. Prior to opening her own firm, Jeanne was a partner and practiced for more than 20 years at one of Indiana's largest law firms.

Certifications/Specializations: Certified Public Accountant (Indiana 2000); Certified Estate Planning and Administration Specialist (Indiana 2007 (inaugural year of certification)).

Bar Admission: Indiana, 1987.

Education: J.D., 1987, Valparaiso University School of Law; B.S. (concentration in Accounting), 1984, Indiana University.

Honors: *The Best Lawyers in America* – Trusts and Estates; *Indiana's Best Lawyers* – Trusts and Estates; *Indiana Super Lawyers* - Estate Planning & Probate; Executive Editor, *Valparaiso University Law Review* (Vol. 21); Recipient, Valparaiso University Law Review Dedicated Service Award; Glenn D. Peters Fellow.

Professional Associations: Allen County Bar Association (Chair, Probate Trust & Tax Section, 1993-1994; Vice Chair, Probate Trust & Tax Section 1992-93); Indiana State Bar Association (District 4 Representative, Real Property, Probate & Trust Section, 1996-98); American Bar Association; Indiana CPA Society; Fort Wayne Estate Planning Council (Board of Directors, 1992-94; President, 1993-94).

Articles Written/Published: "Creating an Advised Fund: Legal, Practical Considerations" (Vol. 40, No. 5, *Res Gestae* 35 (1996)); "Private Judging: An Effective and Efficient Alternative to the Traditional Court System" (21 *Valparaiso Univ. L. Rev.* 681 (1987)).

Civic/Charitable Activities: Indiana Institute of Technology (Board of Trustees, 2004-present; Secretary 2007-present); Toolcraft, Inc. (Board of Directors, 2004-present); The Helen P. Van Arnam Foundation, Inc. (Board of Directors, 1994-present; Secretary and Treasurer, 1996-present); Mary E. Van Drew Charitable Foundation, Inc. (Board of Directors and Treasurer, 1998-present); Valiant Foundation, Inc. (Board of Directors, 2004-2008); Forensic Nursing Specialties, Inc. *d/b/a* Fort Wayne Sexual Assault Treatment Center (Board of Directors 1995-2005; Vice President 1998-2005); Fort Wayne Community Foundation (Board of Directors, 1995-2001; President, 1999-2001; Secretary 1998-1999); Fort Wayne

Ballet, Inc. (Board of Directors, 1993-1995; Second Vice President 1994-1995); Alcohol Abuse Deterrent Program, Inc. (Board of Directors, 1989-1994); Arts United (Leadership Fort Wayne Intern 1993-1994); YWCA (Board of Directors, 1993-1994); Leadership Fort Wayne (Class of 1993).

Seminar Participation: Indiana Continuing Legal Education Forum, Pre-Mortem and Post-Mortem Planning; Indiana Continuing Legal Education Forum, Estate Planning: Lifetime Gifting & Post-Mortem Elections; Indiana Continuing Legal Education Forum, Basic Corporate Practice (Co-Author); Indiana Continuing Legal Education Forum, Advanced Estate Planning – Family Limited Partnerships; Young President's Organization, Estate Planning Primer for the Small Business Owner; Indiana University-Purdue University Fort Wayne, Leave a Legacy; Indiana Women in Law Conference 2000, Estate and Financial Planning; St. Francis University, Families and Disability – Planning Issues and Considerations; Fort Wayne Medical Education Program, Estate Planning Primer for the Family Physician; Canterbury Schools, Governance and Fundraising; Isaac Knapp District Dental Society, Estate Planning Primer for the DDS; U.S. Postal Workers, Retirement Considerations.