



Amy Smith Klass

Partner

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Amy counsels clients in developing custom estate plans, from simple wills to complex plans involving trusts, recognizing the unique needs of each family. She takes time with her clients to determine their specific objectives and to craft a plan to satisfy those objectives that minimizes estate and income taxes and maximizes asset protection. Amy has more than thirty years of experience in estate planning for all types of families, including unique situations such as blended families, families with children who are disabled and family business succession planning. She frequently advises clients on matters involving charitable gift planning as well as advanced estate tax planning techniques.

As part of the planning process, Amy also focuses on developing estate plans for her clients that will make the estate administration process as efficient as possible for a client's loved ones left behind. She has significant experience in advising and assisting individual and corporate fiduciaries, such as executors and trustees, with the estate and trust administration process. Amy also advises fiduciaries and beneficiaries on administration matters such as post-mortem planning techniques and the modification and termination of irrevocable trusts.

Amy enjoys developing a relationship with her clients and working with them and their families over the years to update their plans and adjust to their changing needs and objectives.

Before Fox Rothschild

Amy was a partner at Smith Moore Leatherwood LLP, which combined with Fox Rothschild in 2018.

Beyond Fox Rothschild

Amy is married and the mother of three daughters, and she enjoys spending time with her family. She is an avid tennis player. She and her husband enjoy traveling and spending time in the outdoors hiking and camping.

Amy is an active member of Holy Trinity Episcopal Church where she currently serves on the vestry, is a veteran of three overseas walking pilgrimages and participates in the Servant Leadership School. She is a past officer and board member of the Greensboro Estate Planning Council and a former member of the board of directors of the Greensboro Bar Association, Greensboro Bar Foundation, Greensboro Children's Museum and Sherwood Swim & Tennis Club.

Honors & Awards

- Named to "The Best Lawyers in America" list for Trusts and Estates Law in North Carolina by *Best Lawyers* (2017-2021)



- Recognized in *Business North Carolina's* Legal Elite, Tax and Estate Planning (2014)
- Rated AV Preeminent™ by Martindale-Hubbell®

Practice Areas

- Taxation & Wealth Planning
- Trust & Estate Law & Administration

Bar Admissions

- North Carolina

Education

- University of North Carolina School of Law (J.D., *with honors*, 1987)
 - Order of the Coif
- University of North Carolina at Chapel Hill (B.S., 1984)
 - Business Administration
 - Phi Beta Kappa

Memberships

- North Carolina Bar Association
- North Carolina Bar Association, Member, Elder Law Section
- North Carolina Bar Association, Member, Estate Planning Section
- Guilford County Bar Association
- Greensboro Estate Planning Council