Senior Counsel | Providence, RI | Newport, RI

Kathryn S. Windsor

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Overview

Kathryn is Chair of the firm's Tax Group and is a member of the firm's Trusts and Estates Group. She holds an advanced degree in tax law from Boston University School of Law. Kathryn represents clients in a variety of tax law and trust and estates matters, including sophisticated estate planning, gift and estate tax planning and charitable giving. She also works with tax-exempt entities on formation, compliance and charitable gift planning matters. Her other practice areas include business succession planning, partnership and corporate tax, tax credits and state tax matters.

Prior to joining Adler Pollock & Sheehan, Kathryn was Senior Tax Counsel at a boutique tax law firm in Providence where she managed the firm's tax resolution practice.

Experience

- Authored IRS Private Letter Ruling requests to achieve favorable results for clients.
- Successfully negotiated Offers in Compromise federal and state tax matters.
- Acts as local counsel on a variety of tax related matters including real estate transfer tax matters.
- Assisted numerous clients in forming charitable organizations.
- Advised professional trustees on tax planning for distribution from trusts.
- Counseled clients on charitable remainder trusts.

Credentials

Practices

- Business & Corporate
  - Public Finance
- Trusts & Estates

Education

- Boston University School of Law (L.L.M., Taxation, 2007)

- Roger Williams University School of Law (J.D., 2005)
- Washington University in St. Louis (B.A., History and Anthropology, 1996)

Admissions

- Rhode Island
- Connecticut
- Florida
- U.S. District Court, District of Rhode Island
- United States Tax Court

Honors

- Recognized as a "JD Supra Top Author" in the JD Supra 2023 Readers' Choice Awards.
- Professional Excellence in the Law, Tax, Rhode Island Monthly, 2020 – 2024.
- Managing Editor, Roger Williams University Law Review.
- Fellow, American Bar Association Foundation.

Seminars/Publications

- Contributing Author, Rhode Island Practical Law Trusts & Estates, Practical Law, Thomson Reuters, 2024.
- Co-Presenter – Rhode Island Estate Taxation: Practical Considerations & Tips, Rhode Island Bar Annual Meeting, June, 2024.
- Author, When is a Collectible Not A "Collectible"? NFT's and Internal Revenue Code Section 408(m)(2), The Practical Tax Lawyer, May, 2022.
- Co-author, Revisiting the Rhode Island Acquired Real Estate Company Conveyance Tax, Rhode Island Bar Journal, November, 2021.
- Presenter, CPE Associates, 2019.
- Presenter, New England Institute on Taxation, MAA, 2019.
- Speaker, SCORE'S 19th Annual Federal and State Tax Update, December 2015.
- Guest Lecturer, Business for Modern Media, Emerson College, School of Fine Arts, October 2010 and March 2011.
- Panelist, Financing an Independent Feature Film – A Case Study, September 2020. U.S. Tax Incentive Panelist, 3rd Annual Film Finance Summit, New York, March 2010.

Professional Affiliations

- Member, Rhode Island Bar Association
- Member, American Bar Association (Tax Section, Business Law Section, and Real Property, Estate Law Section).
- Member, Estate Planning Council of Rhode Island

In The Community

- Board of Directors, Executive Women's Golf Association –Rhode Island Chapter, Chairperson, Golf Events (2008-2009).
- Clerk, Voting District III, Richmond, RI (2004-2006).