



Profile

Kelly Phillips Erb is an attorney with the Erb Law Firm, PC. She has both her JD and LL.M. in Taxation from Temple University School of Law. Her primary practice area is tax law and all aspects of trusts and estates, including: estate and tax planning; drafting of wills, trusts, and other estate planning documents; formation and administration of nonprofit and charitable organizations; and all aspects of personal and business tax planning, including the filing of personal, fiduciary, and corporate tax returns. Kelly has also worked on elder law and general corporate matters.

Kelly graduated from the North Carolina School of Science and Mathematics in Durham, NC, before heading to Meredith College in Raleigh, North Carolina. While at law school, Kelly interned at the estates division of the Internal Revenue Service. At the IRS, she participated in the review and audit of federal estate tax returns, even leading in one successful audit.

During law school Kelly worked part-time for the Law Offices of John D. Bernetich, Jr., a AV-rated boutique tax firm in Haddonfield, New Jersey, specializing in estate and gift tax planning. After graduation, she became an associate with the firm. There, she prepared estate, gift and fiduciary returns, drafted accountings and administered a number of estates. She left New Jersey to take a position at Commonwealth Trust Company in Wilmington, Delaware, where she prepared gift and fiduciary returns and worked with attorneys in establishing and administering asset protection, business and dynasty trusts.

Kelly left Delaware for Eizen, Fineburg & McCarthy, LLP, in Philadelphia, PA, where she managed the estates department. There she drafted estate planning documents for high net worth individuals as well as participated in tax compliance work. In May, 2000 she co-founded The Erb Law Firm PC.

Kelly is a member of the American Bar Association, New Jersey Bar Association, Camden County Bar Association, Pennsylvania Bar Association, Tax Supper Club of Philadelphia, and Philadelphia Estate Planning Council. Kelly is a participating attorney with Philadelphia Volunteer Lawyers for the Arts and the IRS's Volunteer Income Tax Assistance (VITA) program, and will coordinate the VITA site at Interac Community Center in Spring of 2002. Kelly presents regularly on a wide range of topics before local and national organizations. She is also president and founder of Just A Girl, Inc., a nonprofit organization dedicated to providing educational and career resources for girls and young women, and Secretary of the Wissahickon Interested Citizens Association.

Presentations

- *Advanced Issues in Probate for the Paralegal*, Institute for Paralegal Education, Philadelphia, PA
- *Taxation for the Freelance Artist*, Philadelphia Volunteer Lawyers for the Arts
- *Tax Tips for Seniors*, Interac Community Center, Philadelphia PA
- *Aspects of International Estate Planning: Qualified Domestic Trusts*, Philadelphia Tax Supper Club, Philadelphia PA
- *Medicaid Benefits: Eligibility and the PA Estate Recovery Act*, Interac Community Center
- *Living Wills and Powers of Attorney*, presentation at Interac Community Center, Philadelphia PA

Courses

- *Operating a Nonprofit*, Mount Airy Learning Tree (Spring 2002)
- *Everything You Wanted to Know About the US Income Tax System*, Mount Airy Learning Tree (planned, Fall 2002)
- *Beyond Estate Planning: What You Need to Know about Aging in America*, Mount Airy Learning Tree (planned, Winter 2002)

Press

- Profile, Temple University School of Law Graduate Tax Brochure for LL.M. candidates
- Profile, Meredith College Alumni Magazine

Kelly Phillips Erb
Attorney at Law

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Education
BA, Meredith College
JD, Temple University School of Law
LL.M., Taxation

Memberships
American Bar Association
New Jersey Bar Association
Camden County Bar Association
Pennsylvania Bar Association
Tax Supper Club of Philadelphia
Phila Estate Planning Council

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