

# CUMMINGS & LOCKWOOD LLC



## RACHEL B.G. SHERMAN

### Background

Rachel B.G. Sherman is a Principal in Cummings & Lockwood's Private Clients Group and is based in the Stamford office. She joined the Firm in 1999. Rachel works with high net worth individuals and families to address their estate planning needs, including the preparation of wills and trusts, tax planning, multi-generational planning, planning for retirement benefits and real estate holdings, gifting and preparation of gift tax returns. Rachel also focuses her practice on estate administration and trust administration, where she advises and assists families through the estate settlement process, handles probate court matters and provides guidance and legal services to fiduciaries.

### Practice Areas

- Private Clients Group
- Wills, Trusts and Estate Planning
- Probate and Estate Administration
- Fiduciary and Trustee Services
- Wealth Protection Planning
- Philanthropic Giving
- International Estate and Tax Planning
- Business Succession Planning

### Education

- University of Florida, Levin College of Law (J.D., *with honors*, 1998)  
Florida Law Review, Member
- University of Pennsylvania (B.A., *cum laude*, 1995)

### Bar Admissions

- New York, 2012
- Connecticut, 1999
- Florida, 1999

### Professional Organizations

- Connecticut Bar Association, Estates and Probate Section, Member



**Rachel B.G. Sherman**

**Principal**

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# CUMMINGS & LOCKWOOD LLC

- New York State Bar Association, Trusts and Estates Law Section. Member
- Florida Bar, Real Property, Probate and Trust Law Section. Member

## Professional Recognition

- The Best Lawyers in America, 2021 - Present
- Martindale-Hubbell, AV Rated

## Civic and Philanthropic Activity

- Penn Club of Fairfield County, Member

## Articles/Publications/Presentations

- "Quid Pro Quo for Charitable Gifts", Webinar, January 20, 2021, *Trusts & Estates Magazine*
- Quid Pro Quo and Fundraising Events, *Trusts & Estates Magazine*, June 2020 Issue, co-author with Conrad Teitel and Katherine C. Gent
- Quid Pro Quo Isn't Just a Political Issue, *Trusts & Estates Magazine*, May 2020, co-author with Conrad Teitel and Katherine C. Gent
- Living Will and Appointment of Health Care Representative, Connecticut, Practical Law Guide, co-author, Thomson Reuters
- Advance Health Care Directive, Connecticut, Practical Law Guide, co-author, Thomson Reuters
- 10 Ways the 2704 Regulations (if finalized) Will Ruin Your Holiday Season