

## DEBRA J. POLLY

Deb Polly is a director in Fennemore's Trusts & Estates practice group who works out of our Phoenix office. Her practice focuses on probate; estate & trust administration; estate planning; retirement benefits planning and administration; estate tax, gift tax, and generation-skipping transfer tax planning, strategy and compliance; and family settlement agreements and negotiation. Deb is also an Arizona Certified Public Accountant.

Originally from Sioux City, Iowa, Deb began her professional career working for KPMG, one of the "Big Four" – the four largest accounting firms in the United States. She gravitated to work involving consulting for estate planning strategies, however, to fully assist her clients, it was evident that she needed to become an attorney – and this led her to law school and a rewarding career in the legal profession. In her work involving estate planning and administration, Deb takes great pride in creating customized solutions – never a "one size fits all" approach – on behalf of her esteemed clients.

Outside of the office, Deb's life is an enjoyable blur as the mother of three teenagers, including a daughter on a travel ice hockey team. Her family also loves exploring Arizona, especially Flagstaff where one memorable trip in July involved torrential hail on the ski lift, and hot cocoa served once they made it back to the lodge.

## EDUCATION

- J.D., Arizona State University Sandra Day O'Connor School of Law
- Master of Taxation, Arizona State University W.P. Carey School of Business
- B.S. in Accountancy, Arizona State University W.P. Carey School of Business

## AWARDS AND HONORS

- Super Lawyers Southwest Rising Stars 2012-2015

## ARTICLES AND PRESENTATIONS

- Organizations: State Bar of Arizona, Arizona ACTEC Meeting, National Business Institute, Valley Estate Planners, East Valley Estate Planning Council, Arizona Community Foundation, Planned Giving Roundtable, Catholic Community Foundation, Central Phoenix Women

- Topics: Advanced Generation-Skipping Transfer Tax and Marital Deduction Issues, Income Tax Planning for Trusts and Estates, Probate Process, Generation-Skipping Transfer Tax Issues in Gift Tax Returns, Other Various Generation-Skipping Transfer Tax Issues (War Stories, General, and Current Status), Tips for Effective Estate Planning

## PROFESSIONAL AND COMMUNITY ACTIVITIES

Vice Chair / Secretary and Board Member of the Estate Planning, Probate, and Trust Section of the Maricopa County Bar Association; Probate & Trust Section of the State Bar of Arizona; Co-Author for LexisNexis Practical Guidance Estate Planning Forms; American Institute of Certified Public Accountants and Tax Section Member; Arizona Community Foundation / Center for Jewish Philanthropy Tax & Legal Seminar Committee; Valley Estate Planners Past President (2011) and prior Board Member

Former Vice President, Treasurer, and Board Member for the Copper State Skating Club, Fresh Start Foundation for Women (Presenter, Financial Series), Habitat for Humanity (volunteer), Fennemore Foundation (volunteer), Regular Volunteer at her children's school (Great Hearts Academies)

## ADMISSIONS

- Arizona
- Nevada