



Carole B. Sheffield

Of Counsel / Philadelphia

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Profile

Carole B. Sheffield is of Counsel in Anderson Kill's Philadelphia office. Carole concentrates her practice in estate and tax planning and trust and estate administration, including real estate matters. Clients include high net worth individuals, financial institutions, closely held businesses and not-for-profit organizations. She is also a member of the Banking and Lending group.

Carole handles complex matters of federal and state tax preparation of estate, gift, fiduciary income and personal income tax returns for trusts and estates. She has extensive experience in Probate and Orphans' Court, where she has litigated and mediated for trusts and estates with regard to non-contested and contested matters for individuals and corporate trustees. She does pro bono probate and litigation work for the Tangled Title Program of Philadelphia VIP, an organization that provides civil legal services to the poor.

Carole is on the Adjunct Faculty at Temple University, Beasley School of Law and serves as an ongoing wealth planning instructor and author for continuing legal education programs at the National Business Institute and Pennsylvania Bar Institute. She is also the Founding Advisory Counselor for the Chestnut Hill Garden District Fund.

Prior to joining Anderson Kill, Carole was a partner in a large Philadelphia-based law firm. Earlier in her career, she developed a successful solo practice in financial legal services, concentrating her practice on estate and trust planning and administration, estate and income tax planning, small business legal consulting, profit and non-profit incorporations, and residential and commercial real estate.

Prior to practicing law, Carole was a Teaching Assistant as well as a Consumer Bankruptcy Clinical Intern at Temple University Beasley School of Law, where she now serves as an Adjunct Professor. She was also a Law Clerk to the Honorable Flora Barth Wolf at the Philadelphia Court of Common Pleas.

While obtaining her Master of Laws degree at Temple University Beasley School of Law, Carole received the first Annual Faculty Award for Outstanding Academic Achievement. While earning her J.D. at Temple, she was President of the Barristers' Society. Carole also earned an Estate Planning Certificate at Temple.

Memberships

Professional Memberships

Philadelphia Bar Association: Probate and Trust Section – Legislative Committee; Tax Section

Pennsylvania Bar Association: Real Property & Trust Section; Tax Section

Association Memberships

PA Elected Committee Woman

Acorn Club – President: Investment Club

Sunnybrook Golf Club

Board Memberships

Appointment – Temple Law Alumni Association Executive Committee

Education

- Temple University Beasley School of Law, LL.M.
- Temple University Beasley School of Law, J.D.
- Temple University Fox School of Business and Management, M.B.A., Beta Alpha Psi
- University of the Arts, B.F.A.

Bar Admissions

- Pennsylvania
- New Jersey
- New York

Court Admissions

- United States District Court for the Eastern District of Pennsylvania
- Supreme Court of New Jersey

Practice Areas

- Wills, Trusts and Estates

Publications

Estate Planning in the “Modern Family” Era

Wills, Trusts & Estates Advisory / September 29, 2015

SIGNIFICANT CHANGES IN PENNSYLVANIA’S GENERAL POWER OF ATTORNEY – WHAT YOU NEED TO KNOW

From the Desk of Anderson Kill Philadelphia / May 5, 2015

END-OF-YEAR ESTATE & TAX PLANNING: "Checklist" For A Successful 2013 & Beyond
Wills, Trusts & Estates Advisory / December 10, 2013

Guarding Your "Tax" Identity From Being Stolen
AgentsofAmerica.org / September 5, 2013

Pets Are 'Family' For Estate Planning
Wills, Trusts & Estates Advisory / December 31, 2012

Protect Your Family's Financial Future: Estate Planning Today May Prevent Estate Litigation Tomorrow
Wills, Trusts & Estates Advisory / December 31, 2012

Speaking Engagements

UNDERSTANDING TAX PROCEDURES TO AVOID PROBLEMS LATER
National Business Institute / October 9, 2012

THE 'ABCS' OF ESTATE PLANNING
Education Conference 2011 / October 7, 2011

TAX TIPS
WHYY Radio / April 1, 2008

News

ANDERSON KILL ADDS REED SMITH TAX, ESTATE EXPERT
July 18, 2012 / Law360

CAROLE B. SHEFFIELD JOINS ANDERSON KILL'S PHILADELPHIA OFFICE AS A SHAREHOLDER IN ESTATES, TRUSTS AND TAX SERVICES GROUP
July 6, 2012 /
