



## Benjamin J. Kelly

### PARTNER

PRIVATE WEALTH CENTER, AZ

PHONE: 480.824.7951

EMAIL: BENJAMIN.KELLY@HUSCHBLACKWELL.COM

PHOENIX, AZ

PHONE: 480.824.7890

### OVERVIEW

At the heart of his practice, Ben helps families navigate the complexities of their personal and financial worlds, building solutions around clients' specific needs in estate planning.

Ben designs and implements sophisticated estate plans for high-net-worth individuals. From the moment he starts talking with a client, their family becomes his family. He uses a variety of financial vehicles to create customized approaches that help his clients succeed from both a business and personal standpoint.

Ben's interest in financial solutions dates to age 24, when he and his wife found out they were expecting twins. After setting up an estate plan for his growing family, Ben discovered his professional calling: helping families protect themselves and providing them financial peace of mind. Ben left his job as a financial advisor and pursued his law degree with the sole focus of becoming an estate planning attorney.

### Industry

Financial Services & Capital Markets

### Service

Private Wealth

*"He is able to communicate clearly all the complicated concepts to all the different parties and brings creative workable solutions."*

— Abraham Paul Sarkis

## Experience

- Advising prominent high-net-worth individuals and families, entrepreneurs, entertainers and celebrities on wealth preservation, intra-family transfers and business succession planning.
- Maximizing income tax and wealth transfer tax efficiencies by developing creative plans that protect assets for future generations, including real property, financial assets, intellectual property and other business interests.
- Advising clients on planning for a liquidity event, such as the sale of a company or private equity transaction.
- Providing guidance on charitable giving arrangements (through both direct giving and the use of trusts) so as to maximize the income and transfer tax benefits of contributions.

## Recognition

- *AzBusiness*, Top 100 Lawyers in Arizona, 2024
- BL Rankings' *The Best Lawyers in America*®
  - Trusts and Estates, 2020-2026
- Thomson Reuters' *Southwest Super Lawyers*, Estate & Probate, 2023-2025
- Thomson Reuters' *Southwest Super Lawyers*, *Rising Star*, 2014-2015

## Education

- J.D., Arizona State University Sandra Day O'Connor College of Law
  - *magna cum laude*
  - Order of Coif
- B.S., Indiana University
  - Entrepreneurship
  - Business Honors Faculty Award

## Admissions

- Arizona
- U.S. District Court, District of Arizona
- Missouri
- Texas
- New York

## Community Leadership

- Temple Solel Endowment Foundation, Vice President, 2016-present



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