Business

SPOTLIGHT

A Dream Realized

When I graduated from law school almost 29 years ago, I was not sure exactly which area of the law would be my pursuit. After clerking for a Federal Bankruptcy Judge, I went to work for a well-respected mid-size law firm, which served clients in many and varied areas of expertise. The firm insisted that their young associates work in all areas of the practice in order to determine their area of interest. Although the firm did not have much of a Trust and Estate practice, I volunteered to take every case in that area that came my way because I quickly determined that I loved helping people through this time in their life when they perhaps had lost a loved one or they were planning their own end-of-life wishes.

Due to the generosity of Gerald "Jerry" Cowan, Esq., an older Trust and Estate lawyer who practiced as a sole practitioner, my Trust and Estate practice grew rapidly. Jerry would send me any Trust and Estate cases that he did not want to handle or that he thought would require much more work than the fee he could charge would justify. He always said, "Marti, you will not make much money on this estate administration, but it is going to teach you how to be a good estate lawyer."

There were some years in my early career when I thought that I could have been dubbed the 'Queen of the Insolvent Estate', but Jerry was right that those cases taught me a lot about Trust and Estate work. As those years passed, I saw a need for clients to feel at home with their Estate lawyer, to feel confident that the lawyer would be there for them at the toughest time in their life and also be there with compassion for their surviving spouse or their surviving children.

Lisa Adler

I formulated a dream to have one of the best Trust and Estate practices in the state. As my practice grew and grew, I decided to open my own boutique law firm, focusing only on Wills, Trusts, Estates and related complex litigation. After many years, my husband and I decided that it was time to merge my own law firm into a larger firm, and in my search to find the right fit, Harrison & Moberly, LLP was easily the most outstanding firm I saw. It was only after I arrived at the firm that I realized that I had merged into one of the most gifted Trust and Estate groups in the entire state of Indiana. The wealth of knowledge among the lawyers was unsurpassed, as they each were recognized experts in their area within the Trust and Estate practice. Whether the sub-area was Business Succession Planning, Estate Planning and Wealth Transfer, Estate and Trust Administration, Tax Controversy or Trust and Estate Litigation, I had merged with some of the best, and without even fully understanding the depth of it, had realized my long-held dream to cultivate one of the best Trust and Estate practices anywhere for the long-term needs and benefit of my clients even after I am gone.

Marti Starkey

Marti Starkey, Esq. and Lisa Adler, Esq. are members of the Trust and Estate Section of the law firm of Harrison & Moberly, LLP, where Marti serves as Chairperson. Other Trust and Estate attorney members of the section include Stephen E. Arthur, Esq., James Harrison, Esq., Jim McGrath, Esq., David W. Russell, Esq., Mark Pfeiffer, Esq., and Mike Rusnak, Esq. (who primarily works in the tax controversy area). These attorneys handle all types of work in this area, including estate planning, estate and trust administration, wealth transfer, business succession planning, tax controversy, guardianship and all types of fiduciary litigation.