



Helen LeVay

Partner

HLEVAY@DBLLAW.COM

Helen LeVay is a partner whose practice focuses on estate planning, estate and trust administration, estate tax planning and related real estate and small business succession planning issues.

Helen has extensive experience in all aspects of the estate planning, including wills and trusts that are drafted to meet each client's individual needs and goals, managing gift and estate tax issues, to help her clients manage their estate in the most efficient manner and to assure that their goals are met for themselves and their families.

Helen also advises clients in their closely held or family held businesses, providing a business succession plan for the entire family. Because of her experience, she can play a crucial role in providing clients with a realistic assessment of how their trust will be managed for their families after they are gone. This process includes a thorough discussion with the client to understand their wishes and goals regarding the trust and the distribution of assets to their family members. This includes identifying beneficiaries, specifying distribution conditions, and considering any unique family dynamics.

Helen helps clients achieve their philanthropic goals through successful estate planning by identifying their charitable goals, choosing the various giving vehicles, such as donor-advised funds,



private foundations, charitable trusts, or direct bequests to charitable organizations. She can also help develop tax-efficient strategies to maximize the impact of charitable giving while minimizing the potential tax burden on the estate. This may involve strategies like charitable deductions, tax credits, and leveraging assets with significant capital gains.

Helen believes strongly in giving back to the community and has served on several non-profit boards. Helen is presently serving on the Board and is Secretary for Pro -Seniors, an organization focused on helping seniors assure quality of life. Helen has provided years of service with Volunteer Lawyers Project, to help clients that could not otherwise afford it, legal services to assist with their estates. Helen has also participated in Wills for Heroes and the Volunteer Lawyers Project Will Clinic.

Helen resides in West Chester with her family.

PRACTICE AREAS

- Estate Planning & Probate
- Real Estate
- Tax Planning & Compliance

PROFESSIONAL AFFILIATIONS

- Ohio State Bar Association
- Cincinnati Bar Association



COMMUNITY INVOLVEMENT

- Helen taught for many years at the former Mid West Trust School for Bankers.
- She has also made presentations at estate planning seminars over the years lecturing on estate planning, estate administration and trust administration, as well as planned giving for philanthropic purposes.

ADMISSIONS

- State of Ohio
- U.S. District Court, Southern District of Ohio

EDUCATION

- J.D., The Ohio State University Moritz College of Law, 1985
- B.A., The Ohio State University, 1982