



## Jeffrey Kolender

### Principal

301-838-3206

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It has been a pleasure working with you over the years.

I will be transitioning to Stein Sperling effective April 24, 2023.

For new and existing clients, you can contact me using the updated information above.

Thanks again and I look forward to continuing our work together.

#### PRACTICE AREAS

Estate Planning

Estate & Trust Administration

Tax: Individual

Tax: Business

#### BAR ADMISSIONS

Maryland

District of Columbia

#### EDUCATION

LL.M. in Taxation, George Washington University National Law Center, 1984

J.D., University of South Carolina School of Law, 1983

B.A., Emory University, 1980

#### ACCOLADES & AWARDS

"Top Lawyers," - *Washingtonian* magazine (2022)

Best Lawyers in America - *Best Lawyers* (2015-2023)  
- Trusts and Estates

Best Law Firms – *U.S. News & Best Lawyers*  
- Tier 2 National Ranking for Trusts & Estates  
- Tier 1 Metropolitan (D.C. area) Ranking for Trusts & Estates

Maryland *Super Lawyers* (2011-2023)

Washington D.C. *Super Lawyers* (2011-2020)

"Top Financial Advisers - Estate Attorneys," - *Washingtonian* magazine (2019-2020, 2022)

"Top Attorneys," *Bethesda Magazine* (2019, 2021)  
- Trusts and Estates

"Top Estate Lawyers" - *Bethesda Magazine* (2011, 2018)

AV Preeminent® Peer Review Rated

## IN THE NEWS

Eight Paley Rothman Attorneys Named in the Washingtonian's 2022 Top Lawyers List

19 Paley Rothman Attorneys Selected 2023 Best Lawyers® in America

10 Paley Rothman Attorneys Named as Maryland Super Lawyers and Two Attorneys Named as Maryland Super Lawyers Rising Stars for 2022

14 Paley Rothman Attorneys Named to the 2023 Maryland Super Lawyers and Rising Stars Lists

Paley Rothman Earns National and Local Honors in U.S. News "Best Law Firms" 2023 Rankings

Paley Rothman Earns National and Local Honors in U.S. News "Best Law Firms" 2022 Rankings

Paula Calimafde Named 2022 Best Lawyers® "Lawyer of the Year" in the Washington, D.C. Area and 21 Paley Rothman Attorneys Selected Best Lawyers in America

Jeffrey Kolender Published in Holocaust Remembered: Stolen Treasures

Paula Calimafde, Jeffrey Kolender, and Michelle Chapin Named 2022 Washingtonian Top Financial Advisers for the Third Consecutive Time

Three Paley Rothman Attorneys Were Selected to Washingtonian's Top Financial Advisers list for 2021

Glenn Cooper No. 1, 13 Paley Rothman Attorneys Named to the 2021 Maryland Super Lawyers and Rising Stars Lists

Twenty Paley Rothman Attorneys Selected to 2021 Best Lawyers in America

Glenn Cooper Top 10, 14 Paley Rothman Attorneys Named to the 2020 Washington D.C. Super Lawyers and Rising Stars Lists

14 Paley Rothman Attorneys Named to the 2020 Maryland Super Lawyers and Rising Stars Lists

Six Attorneys Listed in Washingtonian's December 2019 Edition

3 Paley Rothman Attorneys Listed in Bethesda Magazine's Top Estate Lawyers

Jeffrey Kolender and Deborah Cohn Participated in a "Business Toolbox Seminar"

Jeffrey Kolender Conducts "Dinner & Discussion" Program for the Montgomery County Medical Society

Jeffrey Kolender Named to Three-Year Term as Member of MC Foundation Planned Giving Committee

Jeffrey Kolender Participates in "Pre-Retirement" Seminar

Jeffrey Kolender Presents for the Columbia Union Conference of Seventh-day Adventists

Jeffrey Kolender Serves as Faculty Member for Estate Planning Seminar

Jeffrey Kolender Serves as Panelist at Hebrew Home of Greater Washington Event on Estate Planning

Jeffrey Kolender Speaks to MC Foundation Planned Giving Committee

Deborah Cohn and Jeffrey Kolender Present to World Bank

Jeffrey Kolender Provides Commentary in Forbes Article on Insurance Protection

## RECENT PUBLICATIONS

"My Mother — Renee Kolender," *Holocaust Remembered*, April 2022

"My Father — Pincus Kolender," *Holocaust Remembered*, April 2022

"Advising Clients About Transfers to Children and Grandchildren – Tax and Practical Considerations" (Outline Co-Author)

"Basic Estate Planning for the Small to Mid-Sized Estate" (Outline Co-Author)

"Estate Planning for the Wealthy Client" (Outline Co-Author)

"Irrevocable Life Insurance Trusts—Traps for the Unwary" (Outline Co-Author)

## CIVIC & COMMUNITY INVOLVEMENT

Bar Association of Montgomery County - Chair, Estates & Trusts Section (1992)

Montgomery College Foundation Planned Giving Committee - Member

Hebrew Home of Greater Washington - Board of Directors

B’Nai Israel Congregation - Board of Governors, Former Vice President

## SPEECHES & PRESENTATIONS

"Securing Your Legacy: Estate Planning and Family Philanthropy," a webinar for Bernstein and the United States Holocaust Memorial Museum, May 2021

"Ten Things You Should Know About Estate Planning," Lecturer

"Advising Clients About Transfers to Children and Grandchildren – Tax and Practical Considerations," Lecturer

"Basic Estate Planning for the Small to Mid-Sized Estate," Lecturer

"Estate Planning for the Wealthy Client," Lecturer

"Eight Greatest Estate Planning Techniques in Maryland," Lecturer

"Irrevocable Life Insurance Trusts—Traps for the Unwary," Lecturer