Jefferey M. Yussman

Partner

P 502-562-7544

jyussman@wyattfirm.com

Location

6500 Glenridge Park Place
Suite 7
Louisville, KY 40222-3450

500 West Jefferson Street
Suite 2800
Louisville, KY 40202

Honors

Woodward White's The Best Lawyers in America® in the areas of Elder Law and Trusts and Estates, 1999-2019

Woodward White's The Best Lawyers in America® 2011 and 2019 Louisville Estate Planning "Lawyer of the Year"

Highest Professional AV Rating by *Martindale-Hubbell Law Directory*

Recognized by his peers in *Kentucky Super Lawyers®*

Recognized as one of the "Top Lawyers" in the area of Disability Law, Elder Law and Trusts, Wills & Estates Law by *Louisville Magazine*, 2016

Allen Society Community Service Award

Alberta Wood Allen Continuous Service Award (Metro United Way)

Education

Jefferey M. Yussman is a member of the Estate Planning Group of Wyatt Tarrant & Combs, LLP, in Louisville, Kentucky, where he chairs the firm's special needs planning practice, which he runs under the trade name Yussman Special Needs Law. Jeff's practice has always concentrated in the areas of estate planning and administration, business succession planning and charitable planning, but the birth of his two special needs children led him into the sub-specialty of planning for individuals with special needs, where he now spends a great deal of his practice time. Jeff is the Treasurer and Executive Committee member of the national Special Needs Alliance, and is a Fellow in ACTEC. Jeff has also devoted many years serving his community in leadership roles, including with the Community Foundation of Louisville, Metro United Way, Wellspring (which provides housing and psychiatric rehabilitative services to those facing the challenges of serious and persistent mental illness), and other organizations serving those with special needs. To learn more about Jeff's special needs practice visit Yussman Special Needs Law.

Publications

- Author, "Protecting Your Disabled Client's Settlement or Judgment Proceeds: Issues and Planning Tools," *The Advocate*, September 2018
- Quoted in "Retirement Report," *Kiplinger's Personal Finance Magazine*, August 2017
- Quoted in "Financial Help for Parents of Special-Needs Children," *The Wall Street Journal*, June 2016
- Co-author, "How To Lower the High Cost of Dying - Business Succession 101," *Louisville Business First*, April 2016
- "A Delicate Balance - How Working Affects Public Benefits," Special Needs Alliance (October 2015)
- *Kentucky Estate Planning Handbook* (4th ed. 2015), University of Kentucky College of Law, Office of Continuing Legal Education, Author of the chapter "Special Needs Trusts"

Presentations

Mr. Yussman writes and lectures nationally on topics of estate, special needs, business succession and charitable planning and has served as an adjunct professor of law at the University of Louisville Brandeis School of Law and the Stetson University College of Law (Gulfport, Florida). Following are examples of some of Mr. Yussman's recent publications and speaking engagements:

- *Planning for an Elderly Person with Special Needs,* University of Kentucky Elder Law Conference, November 1, 2018
- *Pitfalls and Preferences for Special Needs Trusts,* Midwest-Midsouth Estate Planning Institute, July 12, 2018
- *Recent Developments & Ethical Issues in Representing the Disabled and Elderly,* Kentucky Justice Association, April 25, 2018
- *Planning for a Special Needs Family Member,* Argi Financial Group, February 2018; Summit Academy, January 23, 2018
- *Legal Planning for Protecting Government Benefits Available to Persons with Special Needs,* Western Kentucky University's Special Needs Summit, October 13, 2017
- *Transition, Estate and Trust Planning for Young Adults with Special Needs*, Summit Academy of Greater Louisville, January 25, 2017
- *Estate and Trust Planning for Relatives of Family Members with a Mental Illness*, Oldham County, KY, "Family to Family" program of NAMI, September 24, 2016
- *Planning under new section 529A (ABLE) accounts legislation*, Estate Planning

1982 - J.D., University of Louisville's Brandeis School of Law; member of Law Review

1979 - B.S. (Accounting), University of Kentucky

Admissions

Kentucky

Council of Louisville, September 21, 2016

- *Special Needs Trust Planning for Families*, Kentucky Society of CPAs' "CPAs & Seniors" Conference, December 8, 2015
- *Tax Basics: Special Needs Planning for Families*, American Bar Association webinar, December 2, 2015
- *Special Needs Trust Planning for Families*, Kentucky Society of CPAs' Elder Law Conference, January 14, 2015.
- *Estate and Trust Planning for Relatives of Family Members with a Developmental Disability*, Stewart Home School, May 17, 2013
- *"Is There a Place for a Family Member with Special Needs in the Family Business?" The Voice (*SNA)
- *Estate and Basis Planning*, Presentation to Various Financial Advisors, 2015
- *The Law of Nonprofit Organizations*, Adjunct Professor, University of Louisville School of Law
- *Estate Planning: How to get going and why not to do it yourself*, National Webinar, American Bar Association, 2014
- *Special Needs Trusts - When and how to use them*, Seminar, Lexington Estate Planning Council, 2014
- *Special Needs and Charitable Planning*, Quarterly Meeting, Partnership for Philanthropic Planning, 2014
- *The Lawyers Role on Nonprofit Boards*, Leadership Academy, Louisville Bar Association, 2014
- *Special Needs Trusts - an Update*, Elder Law Conference, Kentucky Bar Association, 2014
- *Special Needs Trusts and Government Benefits*, Annual meeting of risk managers, KY Society of Health Risk Management, 2014
- *A Look at Estate Planning and Charitable Giving*, Annual Conference, CASE Kentucky, 2014
- *Wealth Transfer Planning for the Closely Held Business Owner*, Seminar, University of Kentucky School of Law, 2013
- *The Law of Nonprofit Organizations*, Adjunct Professor, University of Louisville School of Law, 2013
- *Medicare Compliance and Medicaid Preservation*, Subrogation Seminar, Kentucky Justice Association, 2012
- *Five Things You Need to Know about Drafting and Using Third Party Special Needs Trusts*, Special Needs Trusts - National Conference, Stetson University School of Law, 2012
- *Tax Exempt Organizations from Start to Finish*, Seminar, National Business Institute, 2012
- *Succession Planning for Aging Business Owners*, Seminar, Stetson University School of Law, 2012
- *Advising Closely Held Business Owners*, Annual Business Update, University of Kentucky School of Law, 2012
- *Using a "Benefits Lawyer" as a Neutral in a Mediation*, Annual Subrogation Seminar, Kentucky Justice Association, 2011

Professional Activities and Memberships

- Fellow of the American College of Trust and Estate Counsel
- Board of Directors' Treasurer and Member, Special Needs Alliance
- National Academy of Elder Law Attorneys
- Louisville and Kentucky Bar Associations, Probate Committees
- Estate Planning Council of Louisville

Civic Involvement

- Life Plan of Kentucky (Advisory Board Member)
- Community Foundation of Louisville (Executive Committee Member and Former Board Member)
- Wellspring Schizophrenia Foundation, KY, Inc. (Board of Directors and Past Board Chairman)
- Metro United Way, 20+ years involvement (including Executive Committee of the

Board)

- Leadership Louisville Foundation (Former Board Member)