KnoxLaw

**Knox McLaughlin Gornall & Sennett, P.C.**
Erie • Pittsburgh • Jamestown, NY
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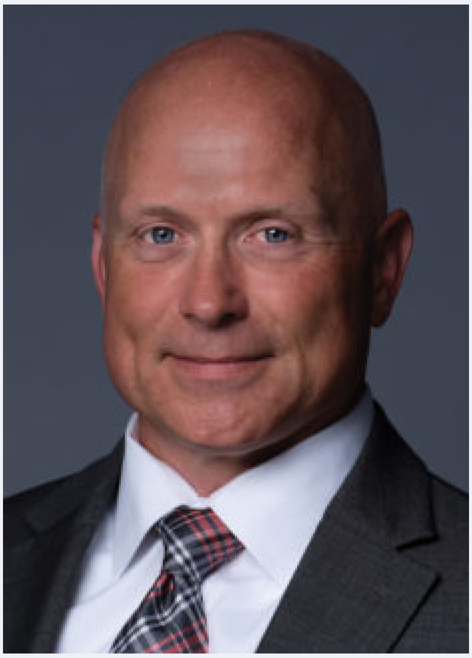
# Jerome C. Wegley



jwegley@kmgslaw.com
Phone: 814-923-4907

## Shareholder

Jerry's practice focuses on asset protection and business succession planning. He helps people protect their assets from taxes, creditors, future ex-spouses and ex-in-laws, and nursing homes, so they may choose who benefits from their assets (themselves, their children, charities, etc.). His previous experience as a CPA helps him advise business owners wishing to keep their business operating after their exit; whether it be by their child or other family member, their employees or another party that will carry on their legacy. He is available to speak on business and tax topics, sophisticated estate planning strategies, asset protection, wealth preservation, long-term care planning, business succession and special needs planning. He also serves as Vice President on Knox Law's Board of Directors.

## Practice Areas

- Business & Tax
- Business Succession
- Elder Law
- Estate Planning & Administration

## Education

- University of Pittsburgh, J.D.
- Gannon University, B.S.

## Admissions

- Pennsylvania
- New York
- Ohio

## Representative Experience

- Successfully structured and implemented succession plans for numerous clients in a variety of industries including $20 million plastics company and $8 million manufacturing company
- Created asset protection plans for multiple clients in high risk occupations, including physicians and

business owners, effectively reducing their liability exposure

- Assisted businesses with ownership and governance matters, sales, acquisitions, mergers, business succession and more, in a variety of industries including manufacturing, hospitality, real estate, nonprofits, professional service organizations, healthcare, oil & gas, cannabis, and more
- Created asset protection plans to protect inherited assets from indiscretion and divorces while mitigating federal and state taxes
- Created asset protection plans for disabled individuals in order to maximize quality of life
- Created asset protection plans for elderly individuals to minimize nursing home expenses
- Developed and presented numerous seminars to regional business owners on succession planning, including information on transferring control and wealth from one owner to another while avoiding any negative impact on the company, employees or community

# Honors

- Included in The Best Lawyers in America® (Trusts and Estates), 2019-2023

JEROME C. WEGLEY 2023 RECOGNIZED BY Best Lawyers

- 2013 President’s Hall of Fame Honoree, *Prep-Villa*

# Community and Professional Service

## Community and Professional Service

- Erie Catholic School System, *Board Member*
- The Arc Erie County, *Board Member*

## Professional Affiliations

- Erie County Bar Association
- Pennsylvania Bar Association
- Pennsylvania Association of Elder Law Attorneys
- National Academy of Elder Law Attorneys
- Pennsylvania Institute of Certified Public Accountants

# Presentations

## Speaking Engagements

- Several presentations through the Knox Law Institute® and firm's Annual Professional Advisor Symposium
- ***Topics include the following:***
- Asset Protection Planning; Business Succession Planning / Family Succession Planning; Estate Planning for Blended Families; Grantor Trusts: Income Tax Reporting Demystified; Wealth Preservation for Seniors / Long-Term Care Solutions (or Lack Thereof) / Medicaid Planning; R Trusts vs. Wills; Special Needs Estate Planning / Planning for People with Disabilities; and more