KnoxLaw

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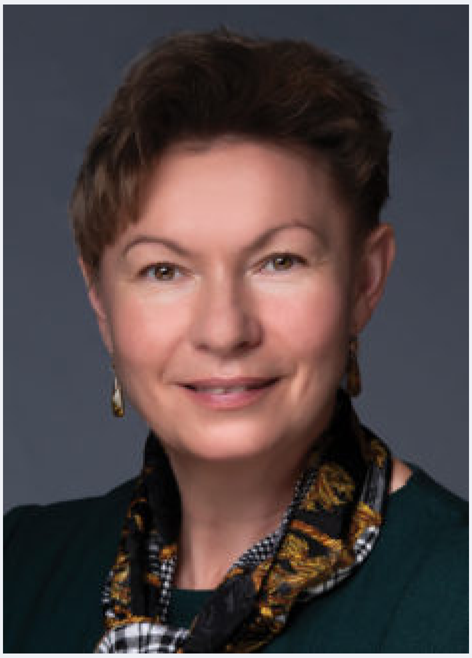
Nadia A. Havard

Counsel

Nadia concentrates her practice in all areas of qualified and nonqualified retirement plans and employee benefits; transfer taxes; fiduciary income tax and trust administration; business; as well as estate planning and administration. She assists clients with retirement plans regarding drafting and compliance issues. She regularly employs efficient wealth transfer planning techniques and assists clients with estate, business succession, and tax planning. She also helps nonprofits obtain and maintain their tax-exempt status. Nadia speaks English and Russian.



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Phone: 814-923-4855

Practice Areas

- Business & Tax
- Business Succession
- Employee Benefits
- Estate Planning & Administration

Education

- Albany Law School, J.D.; *magna cum laude; Tax Law; With Honors*
- Moscow Pedagogical University, M.A./B.A.; *With Honors*

Admissions

- Pennsylvania
- New York
- U.S. District Court, Western District of Pennsylvania
- The New York Third Judicial Department

Representative Experience

- Helps businesses avoid unnecessary expenses and ensure compliance, related to qualified and non-qualified deferred compensation plans
- Worked on appeals regarding federal gift and estate tax
- Obtained tax relief for nonprofit organizations

- Assisted small business owners with business succession and dispute resolutions
- Formed private and public charities
- Advised on fiduciary income tax planning
- Completed complex, semi-complex and simple estate plans

Honors

- "Impact" Award, American Association of University Women, Erie Branch
- John Dugan Prize for academic excellence in tax law and policy, Albany Law School
- Joseph Rosch Prize for highest standing in administrative law, Albany Law School
- Securities Regulations Prize, Albany Law School
- Capital Region Bankruptcy Bar Association Justin Mahoney Memorial Prize, Albany Law School

Community and Professional Service

Community and Professional Service

- Estate Planning Council of Erie, *Board of Directors*
- Erie Philharmonic, *Board of Governors Member*
- Perry Square Alliance, *Board Member*
- Lawyers Associated Worldwide (LAW), *Estate & Private Wealth Group Co-Leader; Emerging Leader Group*
- AAUW, *Member; Past Co-President*
- The Woman's Club of Erie, Inc., *Member*
- Girl Scouts, *Past Co-Troop Leader for Daisy, Brownie and Junior Levels, 6 years*

Professional Affiliations

- Erie County Bar Association
- Pennsylvania Bar Association
- New York State Bar Association
- Estate Planning Council of Erie County
- American Society of Pension Professionals & Actuaries (ASPAA)
- National Center for Employee Ownership (NCEO)

Presentations

Speaking Engagements

- Firm's Professional Advisor Symposium, November 2024: *Business Succession Through Deferred Compensation*

- Lawrence County Career Link Employer Advisory Council (topic: Employee Succession Planning using Deferred Compensation), June 2024

- HVA Long-Term Care Law Seminar (topic: Long-Term Part-Time Employees: New Reality), June 2024

- PICPA Employee Benefit Plans Conference (topic: DOL Updates on Fiduciary Duties and Liabilities), May 2024

- Firm's Annual Professional Advisor Symposium (topic: 10 Common Mistakes in Administering Retirement Plans & IRAs - and How to Fix Them), October 2023
- NCPA SHRM Group (topic: 10 Retirement Plan Administration Mistakes & How to Fix Them), March 2023
- Lawrence County Career Link Employer Advisory Council (topic: Remote and Hybrid Workforce Issues), March 2023
- FEI International Northwestern PA Chapter (topic: Payroll Tax Approaches to Remote Work), February 2023
- Mercer County Career Link Employer Advisory Council (topic: 10 Retirement Plan Administration Mistakes & How to Fix Them), January 2023
- NCPA SHRM Group (topic: Long-Term Part-Time Employees and 401(k) Plan Coverage), November 2022
- Erie SHRM Group (topic: Payroll Tax Approaches to Remote Work), October 2022
- Firm's Annual Professional Advisor Symposium (topic: Retirement Plans: Old Stand-By for Asset Protection), October 2022
- Butler Human Resources Association (topic: Long-Term Part-Time Employees and 401(k) Plan Coverage), September 2022
- MBA HR Roundtable (topic: Long-Term Part-Time Employees and 401(k) Plan Coverage), June 2022
- Firm's Annual Professional Advisor Symposium (topic: What do the SECURE Act and COVID-19 Have To Do with Your Retirement?), October 2021
- Firm's Annual Professional Advisor Symposium Webinar (topic: Hidden Deferred Compensation Arrangements: What You Need to Know), October 2020
- HVA Long-Term Care Law Seminar (topic: CARES Act, The Secure Act and Administrative Pronouncement related to 403(b) Retirement Plans), June 2020
- Secure Act Update to Edward Jones Representatives, February 2020
- Secure Act Update to Northwest Bank, January 2020
- Firm's Annual Professional Advisor Symposium (topic: Trust and Beneficiaries Income Tax Planning: Opportunities and Pitfalls), October 2019
- Firm's Annual Professional Advisor Symposium, Co-Presenter (topic: Exciting (No Really!) Tax Updates: Opportunity Zones, Tax Act Update and the Wayfair Decision), October 2018
- *Principal and Income Act of PA, NY and OH,* to Northwest Bank, March 2018
- Estate Planning Seminar Hosted by United Way of Erie County, February 2018
- Foundation for Sustainable Forests "Loving the Land" Conference, May 2017
- Firm's Annual Professional Advisor Symposium (topic: Private Business Agreements: You, Your Partners, and the IRS), October 2016
- Erie County Bar Association Lunch-N-Learn Seminar: 2015 Federal and State Statutory and Case Law Update, January 2016
- Firm's Annual Professional Advisor Symposium, Co-Presenter (topic: Value Added: The Use of Formal Valuations in Litigation and Divorce), October 2015
- Erie County Bar Association Lunch-N-Learn Seminar: Case Law Update, April 2015
- National Business Institute seminar, "Drafting Effective Wills and Trusts," Erie, PA, December 2014
- Firm's Annual Professional Advisor Symposium, Co-Presenter (topic: To Trust an IRA… or Not), October 2014
- LifeWorks Erie Estate Planning Lecture Series on Powers of Attorney, October 2014
- W.I.L.D. Conference (Women in Leadership Development), April 2014
- Firm's Annual Professional Advisor Symposium, Co-Presenter (topic: Grantor Trusts: Income Tax Reporting Demystified), October 2013

- "Protect Your Assets" Seminar hosted by Crawford Heritage and Bridge Builders Community Foundations, August 2013
- National Business Institute seminar, "The Probate Process From Start to Finish," Erie, PA, December 2013
- "What Do You Need to Know About Estate Planning?" Community Access Television, Erie, PA, January - February 2013
- “The Trust Language” presentation focusing on the trust language and its legal impact, Erie, PA, June 2012
- “Tax Act of 2010” presentation before the Erie County Bar Association, PA, on gift, income and GST tax provisions, April 2011
- “Ethical Wills” presentation on ethical wills before the Women’s Roundtable, Erie, PA, March 2010
- "The Comparative Analysis of Tax Incentives Provided by the United States, The United Kingdom, and Russia to Domestic and Foreign Businesses"; Albany Law Review, Vol. 67, Number 4, Page 1159 (2004), NY