



Advocating for Increased Diversity, Equity and Inclusion in Trust and Estate Planning

September 22, 2022

2022 was the inaugural year for our Trusts, Estates & Legacy Planning (TELP) Practice Group Diversity Task Force. The Task Force consists of ten attorneys from the TELP team and our firm's Diversity of Diversity & Inclusion and was created to increase diversity and inclusion awareness within our practice group and to better serve our clients.

The Task Force identified that diversity for our team encompasses the range of similarities and differences amongst individuals, including but not limited to, national origin, language, race, color, disability, gender, age, religion, sexual orientation, socioeconomic status, and family structures. We have accomplished a lot this year, including successfully conducting trainings for TELP attorneys and paralegals on microaggression and the importance of cultural competence in estate planning. These efforts also included bringing a national estate planning seminar in-house that covered an emerging diversity topic with a current estate planning related tax policy proposal and updating external client materials to be more inclusive for all families.

The TELP team is also committed to diversity within our community and is participating in and creating new diverse law student recruitment and law school social events this fall. While we have had a successful year, the task force plans to keep building awareness in this area for years to come. For the TELP team, increased diversity and inclusion awareness goes beyond forming strong relationships with our clients; it allows us to really hear what our clients are saying so we can achieve their legacy goals.