KRIEG DEVAULT

Andrew P. Simmons

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Andrew Simmons is an estate planning attorney in the firm's Private Client Services practice who advises individuals and families on the preparation and administration of wills, trusts, powers of attorney, and health care directives. He concentrates his practice on estate and tax planning (including federal gift and estate tax), estate and trust administration, asset preservation, business succession, guardianships, and personal services.

Andrew works with families across the wealth spectrum, from modest estates to those with taxable estates and develops sophisticated, tax aware plans to minimize transfer taxes, fulfill charitable goals, and safeguard assets for future generations. He enjoys counseling clients at every stage of life, from young professionals building their estates to seniors planning for legacy and care. Andrew collaborates closely with financial advisors and accountants to craft holistic, coordinated plans that are both thoughtful in design and workable in practice.

Education

- J.D., Washington University School of Law, St. Louis, Missouri, 2007
- B.S. in Environmental Studies, Manchester University, North Manchester, Indiana, 2004

Bar & Court Admissions

- Indiana, 2007
- U.S. District Court for the Northern District of Indiana, 2007
- U.S. District Court for the Southern District of Indiana, 2007

Practices

- Private Client Services
- Business Services
- Real Estate Services

Representative Experience

- Represented clients in developing and implementing estate plans ranging from modest estates to those valued at nearly $400 million, including advanced planning techniques to manage federal gift, estate, and generation skipping transfer taxes.

- Led business succession planning matters involving amendments to governance documents, buy sell agreements, creation of voting and non voting equity structures, and coordinated transfers to family members and irrevocable trusts, often utilizing GRATs and charitable planning vehicles.
- Structured charitable trusts to support clients' philanthropic objectives and collaborated with nonprofit organizations to ensure proper implementation and compliance.
- Advised private family foundations on formation, tax exempt applications, and ongoing regulatory requirements.
- Prepared and filed federal transfer tax returns, including Forms 709 and 706, for portability elections and taxable estates.
- Counseled individual and corporate fiduciaries on their roles and obligations in estate and trust administrations.

Professional Associations

- Member, Indiana State Bar Association
- Member, Allen County Bar Association

Civic Involvement

- Secretary, Board Member, Allen County Bar Foundation

Publications

- Author, "ProSpeak: Estate Planning in Uncertain Times," *Business People* Magazine, January 7, 2021