



## Kevin D. Birkhead

Partner

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### Areas of Practice

- Business, Corporate and Tax Law
- Real Estate Law
- Wills, Trusts and Estates Law

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### Bar Admissions

- Pennsylvania, 2008
- New Jersey, 2008
- Maryland, 2020

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### Education

- Temple University School of Law, LL.M., Taxation, with distinction, 2015
- Rutgers University School of Law-Camden, J.D., *magna cum laude*, 2008
- Saint Joseph's University, B.S., Business Administration, 2003

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### Honors and Awards

- Pennsylvania Super Lawyers, 2022
- Pennsylvania Super Lawyers Rising Start, 2014-2021

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### Bio

Kevin's practice focuses on trusts and estates, business law and taxation.

He assists individuals and families with estate planning, working to design and implement wills, trusts and powers of attorney, and represents executors, trustees and beneficiaries in connection with probate and trust administration. He works collaboratively to understand each client's unique objectives and achieve those goals with tax efficiency. Kevin also works with business owners to plan for the succession of company ownership while accounting for taxation and business continuity.

Kevin assists with the legal and tax aspects of business transactions, including organization of new companies and subsidiaries, secured and unsecured financing, commercial contracts, and structuring asset purchase and stock purchase transactions, mergers, joint ventures and other capital transactions. He frequently represents individual and business clients with residential and commercial real estate transactions, leases, and community association issues.

Kevin has been named to the Pennsylvania *Super Lawyers* Rising Star List from 2014 through 2021 and is currently on the *Super Lawyers* list in Estate & Probate Law. Each year no more than 2.5% of the lawyers in the state are selected by *Super Lawyers* to receive this Honor. Kevin regularly blogs and presents on matters of interest in estate and business law. From 2017 to 2022, Kevin served as an Examiner for the Pennsylvania Board of Law

- Faculty Award for Graduate Taxation, Temple University School of Law, 2015

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#### Professional Associations

- Montgomery County Estate Planning Council
- Montgomery County Bar Association, Chair: Business, Banking & Corporate Counsel Committee, 2019-2020
- Pennsylvania Bar Association
- Montgomery Bar Association, Probate and Tax Section Committee
- Montgomery Bar Association Leadership Academy, 2017

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#### Community Involvement

- Saint Joseph's University Law Alumni Association, Member
- Coach, Warrington-Warwick Boys Basketball
- Alumni Board, Saint Joseph's University Rugby

Examiners, drafting and grading bar exam questions on the topics of estates, taxation and professional responsibility.

Kevin holds a Master's Degree in Taxation from Temple University School of Law, where he received the Faculty Award for Graduate Taxation. He lives in Bucks County with his wife, Rose, and their two children, Patrick and Shannon.

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#### Ratings & Certifications



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#### Representative Matters

Estate of Edward Winslow Taylor Inter Vivos Trust, 2017 PA Super 275, 169 A.3d 658

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#### Classes/Seminars Taught

- "Tax Consequences in Estate Planning", Fundamentals of Estate Planning, Pennsylvania Bar Institute, 2022
- "Complex Assets in Equitable Distribution [Trusts]", Montgomery Bar Association, Family Law Section, 2021
- "Tax Consequences in Estate Planning", Fundamentals of Estate Planning, Pennsylvania Bar Institute, 2020
- "Legal Issues for Small Businesses," Veterans Entrepreneurial Jumpstart Program, St. Joseph's University Veterans Services, 2018
- "New Federal Rules to Report Beneficiary Cost Basis – Form 8971," Estate Law Institute, Pennsylvania Bar Institute, 2017
- "Taxes and Business Strategy," Veterans Entrepreneurial Jumpstart Program, Saint Joseph's University Veterans Services, 2016 and 2017

- “Estate Accountings; Formal or Informal?,” Montgomery County Estate Planning Council, 2017
- “Taxes and Business Strategy,” Entrepreneurship Bootcamp for Veterans with Disabilities, Saint Joseph’s University Veterans Services, 2016 and 2017
- “Closing the Estate: Settlement Agreement or Court Approval,” Estate & Elder Law Symposium, Pennsylvania Bar Institute, 2016
- “Interaction Between Fiduciary Accounting Income, Trust Taxable Income and Distributable Net Income,” Pennsylvania Bar Institute, 2015
- “How to Prepare Fiduciary Accounts & Avoid Common Traps,” Pennsylvania Bar Institute, 2014
- “Business Succession Planning,” Panelist for Society of Financial Service Professionals – University Partners Program, Saint Joseph’s University, 2013

## CONTACT US

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Have questions? Call us at 215.646.6000 or visit us online at [timoneyknox.com](http://timoneyknox.com)