LANE POWELL

Mary Lee

Mary Lee Moseley | Shareholder

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Mary Lee Moseley has devoted her career to designing sophisticated estate planning strategies, and trust and estate administration. Serving as a trusted advisor for more than 30 years, clients come to Mary Lee because of her high level of service, good judgment and deep knowledge.

As part of the Band 1 *Chambers High Net Worth* ranked team at Lane Powell, Mary Lee is recognized for her long-standing experience dealing with estate planning and trust administration. She also works extensively on charitable matters with tax-exempt organizations. One wealth expert states: "She has real leadership skills. She is very analytical and can really get to the root of any estate planning problem." Another market insider reports: "There was nothing she wasn't able to handle and she always provided very helpful advice on what was a difficult estate to manage."

Mary Lee advises clients on complex estate planning, estate and trust administration, IRS gift and estate tax audits, charitable planning and private foundations. Before joining Lane Powell, she served 16 years as a Director with Deloitte Tax, LLP's Estate, Gift and Trust Tax Practice, where she was responsible for the planning and implementation of transfer tax strategies for high net worth individuals and the administration of complex estates.

Practices & Industries

Nonprofit & Social Enterprise

Private Client Services

Education

Boston University, LL.M. in Taxation, 1989

University of Washington School of Law, J.D., 1987

- Touche Ross Fellowship

University of Massachusetts, M.S., Sports Administration, 1980

Bowdoin College, B.A., Sociology and Anthropology, *magna cum laude*, 1979

Admissions

Washington

Professional Experience

The Law Offices of Mary Lee Moseley (2013-2014)

Deloitte Tax LLP, Estate, Gift and Trust Tax Practice, Director (1997-2013)

Titchell, Maltzman, Mark & Ohleyer PC, Director (1993-1997)

Giancarlo & Gnazzo, Associate (1993)

Verrill Dana LLP, Tax Associate (1987-1992)

Seattle Sounders (NASL) and Tacoma Stars (MISL), Director of Ticketing (1980-1984)

California

Maine

Languages

German - Conversational

Honors

Chambers High Net Worth, Private Wealth Law (2017-2020)

AV Preeminent® in Martindale-Hubbell® Peer Review Ratings™

LinkedIn

mary-lee-moseley-205ab712

Community Involvement

Estate Planning Council of Seattle, Member

Washington Women in Tax, Member

Seattle Philanthropic Advisors Network, Member

The Nature Conservancy Planned Giving Advisory Committee, Member

Washington State Bar Association, Taxation Section, Member

State Bar of California, Trusts and Estates Section, Member

Bowdoin College Alumni Fund, Class Agent

Seattle Immigration Response Team, Volunteer

Thought Leadership

August 20, 2020 | Publication
2020 Gifting Considerations
Private Client Services Legal Update

July 9, 2020 | News
Lane Powell Again Receives Top Rankings in *Chambers High Net Worth* 2020
Awards & Honors

June 17, 2020 | Publication
Estate Planning, Probate, and Trust Administration in Washington
Washington State Bar Association Deskbook

October 3, 2019 | Event / CLE
On Beyond Zebra! — Working With Modern High Net Worth Clients
Lane Powell Trusts & 'Tinis Seminar | Seattle

July 12, 2019 | News
Fiduciary Litigation and Trusts & Estates Teams Receive Top Rankings in *Chambers High Net Worth* 2019
Awards & Honors

May 28, 2019 | Event / CLE
SOLD OUT Nonprofit & Social Enterprise Seminar: New Ways of Doing Good
Lane Powell Seminar | Seattle

October 18, 2018 | News
Fiduciary Litigation and Trusts & Estates Teams Receive High Rankings in *Chambers High Net Worth* 2018

Awards & Honors

March 22, 2018 | Event / CLE
Perfect Raincoats: Planning for Changing Seasons
Lane Powell Beneficiaries & Brews Seminar | Portland, Oregon

February 8-9 2018 | Event / CLE
Practical & Inspired Planned Giving Seminar
Lane Powell and del Prado Philanthropy | Seattle

November 2017 | Event / CLE
A Potpourri of Post-Mortem Planning
62nd Annual Estate Planning Seminar | Seattle

September 28, 2017 | Event / CLE
You Decant Take It With You… But We Have a Few Ideas to Share
Lane Powell Trusts & 'Tinis Seminar | Seattle

May 30, 2017 | News
Trusts & Estates Team Receives High Rankings in *Chambers® High Net Worth* 2017
Awards & Honors

November 2, 2016 | Publication
Private Foundations: Taking Them Beyond Checkbook Philanthropy
Seattle Business Magazine

September 1, 2016 | Event / CLE
Minimizing the Blind Spots: What the EO Lawyer Needs to Know About Trusts and Estate Planning and Administration
Adler & Colvin | San Francisco

August 11, 2016 | Event / CLE
Funding Trusts in Estate Planning
Lorman Education Services | Webinar

May 9, 2016 | News
Moseley Joins the Estate Planning Council of Seattle
Firm Announcement

May 6, 2016 | Event / CLE
The Nuts and Bolts of Planned Giving — Part II: Complex Gifting Methods
Seattle Children's Continuing Education Conference on Philanthropic and Legacy Planning for Advisors | Seattle

November 3, 2015 | Event / CLE
A Practical Walk Through of the 706, 709 and Washington Filings
Estate Planning Council of Seattle and the University of Washington School of

Law | Seattle

November 25, 2014 | Publication
Trustee Selection: Choose Wisely if Your Family-owned Business Will Be Held in a Trust
Seattle Business

September 29, 2014 | News
Moseley Joins Lane Powell's Trusts and Estates Practice Group
Firm Announcement