



## Summer G. Shelverton

### PARTNER

Summer is Chair of the Trusts & Estates Department. She enjoys creating and implementing estate planning strategies to accomplish a client's goals.

 Call 808.521.9236    Fax 808.521.9210    [sshelverton@caes.com](mailto:sshelverton@caes.com)

 Honolulu: 1000 Bishop Street, Suite 1200, Honolulu, HI 96813

## Overview

Summer is Chair of the Trusts & Estates Department. She enjoys creating and implementing estate planning strategies to accomplish a client's goals.

Summer concentrates her practice in the areas of estate planning, probate and trust administration, conservatorship and guardianship proceedings, and trust and estate disputes. She also assists clients with international estate planning issues, including investing in U.S. real property and pre-immigration planning.

An especially important and gratifying part of Summer's job is to educate clients and distill complex ideas into a readily understandable and user-friendly format. She believes that a successful client relationship is built on listening to the client and finding the right solution to accomplish their individual objectives.

Summer is a Fellow of The American College of Trust and Estate Counsel (ACTEC), a peer-elected national nonprofit association with a mission to improve and reform probate, trust, and tax law procedures and professional practice standards. She is a member of the Hawaii Probate Committee and former chair of both the Probate and Estate Planning Section and the Elder Law Section of the Hawaii State Bar Association. She is also a member of the Hawaii Estate Planning Council. She regularly speaks to business groups and provides continuing legal education seminars in the areas of probate and estate planning, including emerging laws, such as fiduciary access to digital assets. She recently served as part of the drafting committee for Hawai'i's new Uniform Trust Code, which introduced and facilitated enactment of legislation adopting the Uniform Trust Code in Hawai'i.

Summer obtained her B.A. from the University of North Carolina at Chapel Hill and received her law degree, summa cum laude, from the University of Hawai'i, William S. Richardson School of Law. While in law school, Summer served as Co-Editor-in-Chief of the University of Hawai'i Law Review and was a judicial extern for the Honorable Richard R. Clifton, United States Court of Appeals for the Ninth Circuit.

## Practices & Industries

### **Banks & Financial Institutions**

### **Finance**

### **Litigation**

### **Non-profit & Tax-Exempt Organizations**

### **Tax**

### **Trusts & Estates**

- Conservatorship & Guardianship Proceedings
- Estate Planning
- Probate Administration
- Trust & Probate Dispute Resolution & Litigation
- Trust Administration
- Wealth Preservation & Asset Protection

## Noteworthy

---

### Experience

- **Estate Planning:** Preparing estate planning documents including wills, revocable trusts, and irrevocable trusts for tax planning, asset protection, and other purposes
- **Tax Planning:** Advising individuals and families on estate, gift, and income tax planning for a variety of investments, including real property, retirement assets, business interests, and life insurance
- **Probate and Trust Administration:** Advising individual and corporate fiduciaries on trust administration, fiduciary income tax reporting, and risk management
- **Trusts and Estate Disputes:** Representing clients in contested trust and probate proceedings, including breaches of fiduciary duty, disputes as to the validity of documents, and elective share proceedings
- **Conservatorship and Guardianship Proceedings:** Representing clients in guardianship and conservatorship proceedings

### Awards

- Listed in *Chambers and Partners*, High Net Worth Guide, since 2021
- Listed in *Best Lawyers*®, since 2019
- Listed in *Super Lawyers*®, 2020-2022

### Credentials

---

### Education

- J.D. (2012), William S. Richardson School of Law, University of Hawai'i, *summa cum laude*, Co-Editor-in-Chief, University of Hawai'i Law Review
- B.A. (2006), University of North Carolina at Chapel Hill

### Admissions

- All courts of the State of Hawai'i
- United States District Court for the District of Hawai'i
- United States Court of Appeals for the Ninth Circuit

### Membership

- American College of Trust and Estate Counsel, Fellow
- Hawaii Tax Institute, Institute Advisory Committee (US)
- Uniform Probate Code and Probate Court Practices Committee, Court Appointed Member
- Hawaii State Bar Association, Elder Law Section, Former Chair
- Hawaii State Bar Association, Probate & Estate Planning Section, Former Officer
- Hawaii Estate Planning Council, Member
- Hawaii State Bar Association and American Bar Association

## Publications

---

- "Hawai'i's New Uniform Trust Code: Part II," *ke kumu* (Fall/Winter 2022) (Co-Author)
- "A New Year, New Leadership, and (Potential) New Estate Tax Laws," *ke kumu* (Spring/Summer 2021) (Co-Author)
- "Hawai'i Adopts New Uniform Trust Code: What is it and What Does it Mean for You?" *ke kumu* (Fall/Winter 2021) (Co-Author)
- "Big Trouble for Family Businesses: Valuation Discount Planning at Risk for Closely-Held Family Businesses," *ke kumu* (Winter 2016) (Author)

## Speaking Engagements

---

- "Estate Planning for My Business," Cades Schutte Corporate Counsel seminar (September 2023) (Co-Speaker)
- "Asset Protection Strategies for Real Estate Investors," Certified Commercial Investment Member (CCIM) Institute Webinar (March 16, 2021) (Speaker)
- "The Biden Administration: Taxes," Hawaii State Bar Association (March 10, 2021) (Speaker)
- "Basic Estate Planning," Hawaii State Teachers Association (August 14, 2020) (Speaker)
- "Top 6 Probate Problems and How to Solve Them," National Business Institute (December 18, 2017) (Speaker)
- "The Ultimate Guide to Probate," National Business Institute (July 19, 2016) (Speaker)