

Kathleen Hogan Aguilar

MEMBER

Grand Rapids

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Katie Aguilar counsels families and individuals on elder law, estate planning, probate and trust administration, and special needs matters.

Ms. Aguilar is Co-Chair of the Elder Law practice and works with seniors and their families to navigate the complex world of aging and long-term care, including Medicaid and Veteran's benefits. Her mission is to be an advocate for and a source of comfort to families in crisis. She focuses a significant portion of her practice on assisting individuals with special needs, from Special Needs Trusts to guardianships and conservatorships.

Ms. Aguilar has advised a wide range of clients on estate planning. She routinely works with young families, non-traditional families, seniors, and families with loved ones with special needs. Katie plans and recommends custom estate planning solutions based on each family's unique situation and dynamics. Katie also works with families who have recently lost a loved one, assisting in wrapping up their affairs, helping the family through probate, or administering the trust.

Ms. Aguilar is Chair of the Vacation Home Planning Group and assists families in planning for their

Practice Areas

- [Probate](#)
- [Estate Planning](#)
- [Elder Law - Medicaid Planning](#)
- [Disability and Special Needs Planning](#)
- [Vacation Home Planning](#)
- [Guardianships and Conservatorships](#)
- [Private Client](#)
- [Personal Legal Services](#)
- [Mental Health Law](#)

Education

- J.D. *cum laude*, University of Notre Dame Law School, 2006
- B.A., University of Notre Dame, 2003

Bar Admissions

- Michigan, 2011
- Illinois, 2006



beloved cottages, lakeshore and lakefront properties, and second houses. She works with families to develop a succession plan that respects the family dynamics and values, while minimizing tax consequences.

Ms. Aguilar was named as a SuperLawyers Rising Star in 2016. She is a member of the National Academy of Elder Law Attorneys (NAELA) and the Council on Aging. She is a member of the Grand Rapids Bar Association Probate Section Steering Committee and a board member for the Spartan Stores YMCA. Some specific services Ms. Aguilar has experience with:

- Drafting estate plans and providing advice on asset protection
- Probate and trust administration, including fiduciary tax returns
- Planning for individuals with disabilities and other special needs including OBRA '93 and Third Party Special Needs Trust
- Advising seniors and their family members on Medicaid planning
- Establishing and administering guardianships and conservatorships
- Planning for vacation homes including succession using estate planning vehicles such as qualified personal residence trusts and family partnerships, as well as limited liability companies (LLCs) and co-ownership arrangements.

Ms. Aguilar received her law degree, *cum laude*, in 2006 from University of Notre Dame, where she also received her bachelor's degree in 2003. She is admitted to practice law in the State of Michigan.



Articles and Presentations

Ms. Aguilar regularly speaks on a variety of estate planning topics to groups ranging from professionals to nonprofit groups. In addition, she is a prolific writer for a variety of publications. Recent activity includes:

- “Special Needs Fairness Act,” *Miller Johnson Client Alert*, January 10, 2017
- Co-Editor of ICLE’ Michigan Estate Planning Handbook
- ICLE Probate and Estate Planning Institute, May 2016, presented on Medicaid and Disability Update
- ICLE drafted Top Tips for Drafting Caregiver Contracts
- ICLE September 2016 presented on Using Special Needs Trusts Efficiently at the Elder Law Institute
- ICLE presentation, April 2015, Working with Paralegals
- “The ABLE Act. How Useful is the New Option for Special Needs Planning?” *Miller Johnson Client Alert*, June 30, 2015
- ICLE September 2015 presented on Caregiving Contracts at the Elder Law Institute
- June 2016: Legal Considerations in Housing Choices (presentation) at Advocates for Senior Issues
- January 8 2015: client alert on Cottage Law- new guidelines
- March 2015: Cottage and Lakeshore Living Expo- Transferring the Family Cottage
- “Cottage Succession: Family Transfer Exemption Changes!” *Miller Johnson Client Alert*, October 13, 2014
- March 2014: Cottage and Lakeshore Living



Expo- Transferring the Family Cottage

- “Paying Family Caregivers Can Cause Medicaid Penalties” *Miller Johnson Client Alert*, April 11, 2014
- “The Basics of Medicaid Divestments,” *Miller Johnson Client Alert*, April 11, 2014
- “Transferring the Family Cottage,” Cottage and Lakefront Living Show at DeVos Place on March 28 and 29, 2013
- “Drafting Caregiver Contracts,.” ICLE 23rd Annual Seminar on Drafting Estate Planning Documents; Jan. 23, 2014 in Grand Rapids and Feb. 13, 2014 in Plymouth, MI.
- “Keeping Real Estate in the Family... Time to Rethink Your Plan?,” *Miller Johnson Client Alert*, Feb. 13, 2014
- “Family Cottage Transfers: Transfers to Children by Will, Trust or LLC Will Lead to Uncapping,” *Miller Johnson Client Alert*, Dec. 27, 2013
- “SCAM Warning! Deed Processing Notices and Articles of Incorporation Processing Notices: It Looks Official, But Is It Really Official?,” *Miller Johnson Client Alert*, Dec. 16, 2013
- “Cottage Succession Strategies: Changes on the Horizon,” *Miller Johnson Priority Read* newsletter, May 29, 2013
- “Working with executors and administrators,” Institute for Paralegal Education’s “Probate Process from Start to Finish” Seminar; May 20, 2013
- “How to prepare and file the inventory,” Institute for Paralegal Education’s “Probate Process from Start to Finish” Seminar; May 20, 2013
- “What to Ask the Nursing Home” article in *West Michigan Woman*, April 2013



- “Keeping the Family in the Family Cottage”
March 15 and 16, 2013 at the Cottage and
Lakefront Living Show at DeVos Place in Grand
Rapids
- “Elder Law-Top Ten Questions” on Sept. 21,
2012 at the State Bar of Michigan (SBM) Annual
Meeting held in conjunction with the ICLE Solo
and Small Firm Institute
- “Special Needs Trusts,” *BRAINS Express*,
(publication of Behavioral Resources And
Institute for Neuropsychological Service)s, May
2012

