



Alexandra E. Otto

Associate

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OVERVIEW:

Alex advises and guides clients through both the estate planning and the estate administration process. She identifies and implements various options and strategies to achieve clients' objectives and utilizes combinations of different vehicles to achieve such objectives while taking into consideration clients' unique family dynamics and interpersonal relationships. She also provides guidance and support to clients regarding their obligations and duties when acting in various fiduciary capacities. Additionally, she aids clients in navigating the estate administration process by preparing various state and federal tax returns, creating and executing family settlement agreements, and drafting, filing, and defending formal accountings before county orphans' courts.

Her practice routinely includes aspects and elements of estate planning including:

- Transitioning family businesses
- Portability
- Gifting
- Generation skipping transfer tax
- Inheritance tax
- Medicaid planning
- Various state probate processes
- Step-up basis

Alex also counsels and represents clients in real estate transactions. She assists clients with purchasing and selling real estate by providing guidance throughout the entire process from the negotiation of the terms of the transaction through the execution of the finalized documents. She advises clients about realty transfer tax concerns, like-kind exchanges, preferential tax assessment programs such as Clean & Green, resolving title issues and financing, lending, and leasing arrangements.

Prior to joining the firm, Alex took every opportunity to focus her studies at both Dickinson School of Law and

Georgetown University on not only tax, but also the interaction of tax and estate planning. She served as the student coordinator for the Volunteer Income Tax Assistance program at Dickinson overseeing the preparation of and helped to prepare hundreds of returns annually. She also interned for the Pennsylvania Department of Revenue briefing issues and drafting opinions on corporate tax and personal income tax cases.

Alex's background in the areas of tax, real estate and estate planning and administration permits her to provide comprehensive services to her clients as she can preemptively identify a variety of issues that arise in these areas and appreciate the impact that aspects of these areas of law have.

In her free time, Alex enjoys running, traveling, scuba diving and spending time with her pets.

EDUCATION:

- Georgetown University Law Center, LL.M.
- Penn State Dickinson Law, J.D.
- Florida Institute of Technology, B.A., summa cum laude

ADMISSIONS:

- Pennsylvania

PRACTICE AREAS:

- Real Estate
- Trusts & Estates

COMMUNITY INVOLVEMENT:

Carlisle Family YMCA

Board of directors

MEMBERSHIPS:

- Cumberland County Inn of the Court, former member
- Cumberland County Bar Association

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March 28, 2023
- LLC Operating Agreement Tax Trap; IRS Ruling
January 4, 2023
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