



## Susan L. Racey

### Partner

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Susan Racey focuses her practice in the areas of estate and business succession planning, probate and trust administration, charitable giving, taxation, guardianships, and equine law.

In addition, Susan enjoys a reputation as a respected advocate in the specialized area of probate litigation.

An OSBA Certified Specialist in Estate Planning, Trust and Probate Law, Susan designs estate plans through the use of wills, trusts, limited liability companies, family limited partnerships, and other vehicles. She handles the administration of complex trusts and estates, as well as litigation involving contested matters in the probate courts. She frequently advises individuals and charities on the issues of charitable giving. She has lectured on a wide variety of estate planning and probate topics.

Highly respected in the Cleveland market, Susan is ranked in Chambers USA's High Net Worth Guide 2021: Private Wealth Law (Ohio). Sources describe her as a "fierce advocate for her clients" and "very thorough, very careful and very nice to work with."

### Education

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- Case Western Reserve University School of Law (J.D., magna cum laude, 1989); Order of the Coif; Law Review, Editor
- University of Dayton (B.A., 1986)

### **State Admissions**

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- Ohio, 1989
- Florida, 2016

### **Certifications**

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- OSBA Certified Specialist in Estate Planning, Trust and Probate Law

### **Service Areas**

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- Financial Services
- Opportunity Zones
- Corporate Law
- Estates, Trusts & Probate

### **Industries Represented**

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- Accounting Firms
- Civic Organizations
- Nonprofit Organizations
- Private Households & Individuals
- Professional Organizations
- Real Estate
- Religious Organizations

## Publications & Events

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### LEGISLATIVE TESTIMONY

- [Statement of the Ohio State Bar Association in Support of Senate Bill 210](#) (March 2022)
- [Statement of the Ohio State Bar Association in Support of Senate Bill 199](#) (October 2021)
- [Statement of the Ohio State Bar Association in Support of Senate Bill 210](#) (October 2021)

### RECENT SPEAKING ENGAGEMENTS

- “The Ohio Legislative Process and Recent Developments for Estates and Trusts” and “Sometimes It Takes More Than a Village: Status of Marital Agreements in Ohio and New Developments,” 17th Annual Estate Planning Seminar, Boy Scouts of America (September 2022)
- “Estate Planning Charitable Giving: What, Why, and How?,” Cleveland Zoological Society Planned Giving Breakfast (September 2022)
- “For Better or for Worse: Status of Marital Agreements in Ohio and New Developments,” 15th Annual Estate Planning Seminar, Boy Scouts of America (September 2020)
- “Claims Against the Estate,” 14th Annual Estate Planning Seminar, Boy Scouts of America, Cleveland, Ohio (September 2019)
- “Till Divorce or Death Do Us Part: Status of Marital Agreements in Ohio and New Developments,” Marvin R. Pliskin Advanced Probate and Estate Planning Seminar, Columbus, Ohio (September 2019)
- “Until Divorce or Death Do Us Part,” Hot Topics for Estate Planners, Cleveland Metropolitan Bar Association, Cleveland, Ohio (June 2019)
- “Estate Planning Charitable Giving: What, Why, and How?,” Planned Giving Breakfast, Cleveland Metroparks and Cleveland Zoological Society, Cleveland, Ohio (March 2019)

### PUBLICATIONS

- [“Is It Time for Ohio to Consider a Move Toward Stronger Silent Trust Legislation?”](#), *Probate Law Journal of Ohio* (March/April 2022)
- [“What to Do When a Prenuptial Agreement Is Not Part of ‘I Do,’”](#) *Crain’s Cleveland Business* (November 2019)
- [“The Postnuptial Agreement Renaissance,”](#) *Probate Law Journal of Ohio* (July/August 2019)
- [“SLATs Offer Opportunity to Save on Estate Taxes,”](#) *Crain’s Cleveland Business* (November 2018)
- [“Keeping the Champagne on Ice: Ohio Law Ups Age Limit on Custodial Accounts for Minors,”](#) *Crain’s Cleveland Business* (November 2017)
- [“How to Protect Inherited IRAs,”](#) *Crain’s Cleveland Business* (November 2014)
- [“Estate Planning for Non-Traditional Families,”](#) *Probate Law Journal of Ohio* (March/April 2014)

2013)

- “Are You Smarter than an Estate Planner?,” *Cleveland Metropolitan Bar Journal*, Vol. 1 No. 15 (June 2009)

#### **MEDIA**

- “Lawmaker Wants to Bring Postnuptial Agreements to Ohio,” Spectrum News 1 (July 2021)
- “Boomer Factor: Law Firms Face Retirement Needs of Largest Generation in U.S. History ,” *Crain’s Cleveland Business* (January 2020)
- [Komen Ohio Pink Divas Campaign](#), “Sunny Side Up,” CBS-19 News (October 2019)

#### **Honors**

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- Chambers High Net Worth
  - » Private Wealth Law (Ohio) (2021, 2022)
- Martindale-Hubbell® AV Preeminent® Peer Rating
- ALM, Women Leaders in the Law (2015)
- Ohio Super Lawyers® (2006–2023)
- The Best Lawyers in America® (2007–2023)
  - » 2017 Cleveland Lawyer of the Year (Litigation – Trusts and Estates)

### **In the Community**

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- American College of Trust & Estate Counsel, Fellow
- Case Western Reserve University School of Law, Planned Giving Committee
- Cleveland Metropolitan Bar Association
  - » Estate Planning, Probate & Trust Law Section
    - » Chair (2009)
    - » Vice Chair (2008)
    - » Secretary (2007)
    - » Treasurer (2006)
    - » Speakers Chair (2005)
- Cleveland Metropolitan Bar Foundation
  - » Trustee (2010-2015)
  - » Communications & PR Committee, Co-Chair (2010-2011, 2013-2015)
- Ohio State Bar Association
  - » The Marvin R. Pliskin Advanced Probate and Estate Planning Seminar, Co-Chair (2021)
  - » Estate Planning, Trust and Probate Law Section, Member
  - » Council of Estate Planning, Trust and Probate Law Section
    - » Executive Committee, Treasurer
- Cuyahoga County Bar Association, Unauthorized Practice of Law Committee (2006-2007)
- Estate Planning Institute
  - » Chairman (2003)
  - » Curriculum Committee (1999-present)
- Fieldstone Farm Therapeutic Riding Center, Trustee (2014-2019)
- Fieldstone Farm Therapeutic Riding Center (TRC) Foundation, Trustee (2020-present)
- Cleveland Zoological Society, Board of Trustees (2020-present)
- Susan G. Komen Northeast Ohio, Founding Pink Diva (2019-present)
- Hattie Larlham, Art in the Woods, Planned Giving Co-Chair
- University Hospitals Diamond Advisory Group