



Alexis N. Sumner

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Profile

Alexis Sumner is a partner in the Estate and Wealth Transfer Planning Group of Bose McKinney & Evans LLP. When assisting with estate plans, Alexis prepares documents including wills, trusts and lifetime documents (i.e., power of attorney, health care power of attorney and living will), reviews assets and suggests asset titling and beneficiary designation strategies, assists with necessary asset transfers and provides tax minimization advice. Alexis also handles estate and trust administration for clients, including opening and administering probate estates, advising executors and trustees on their duties, preparing federal estate tax returns and working with accountants regarding income tax issues. In addition, she has experience in establishing non-profit corporations and applying for federal income tax-exempt status (501(c)(3)). Alexis also prepares prenuptial agreements and establishes guardianships. She is a member of the National Editorial Board for *The Estate Planner* newsletter.

Prior to attending law school, she worked as a property insurance claims adjuster for Federated Mutual Insurance Company. Alexis graduated *summa cum laude* from the Indiana University Robert H. McKinney School of Law – Indianapolis and holds an undergraduate degree in international relations and diplomacy from Schiller International University in Heidelberg, Germany.

Education

Indiana University Robert H. McKinney School of Law – Indianapolis (J.D. *summa cum laude*, 2006)

Schiller International University (B.A. in international relations and diplomacy, valedictorian 1998)

Honors / Awards

Indiana Law Review note development editor; dean's list; John J. Dillion Memorial Scholarship (2005, 2006)

Appearances / Publications

Indianapolis Bar Associate Low Asset Will Program (2013); "Estate Planning 101" and personal pro-bono consultations (Heritage Place on Meridian Street, 2011, 2012)

Appointments / Memberships

Member: National Editorial Board for *The Estate Planner* newsletter; member of the Executive Committee of the Estate Planning and Administration Section of the Indianapolis Bar Association; former Whitestown (Indiana) Town Judge; Women's Fund Options alumnae

Admissions

Indiana