



Courtney L. Kelley

Associate

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Courtney works closely with clients to create customized solutions for their family succession planning and trust administration needs. She provides thorough, strategic advice to assist her clients in all aspects of estate planning, tax planning, administration of trusts and estates, asset protection, wealth transfer, charitable planning, marital agreements, and settlement of complex estate matters.

As a trusted advisor, Courtney works along-side clients to establish and administer trusts, to provide strategies for trust modifications and mergers, and to handle all aspects of both simple and complex planning agreements. She also represents fiduciaries and beneficiaries in probate proceedings, and guardians and wards in guardianship proceedings. She has represented clients in a variety of matters, including contested trust and estate accounting proceedings, will and trust contests, contested guardianships, and appellate cases. She regularly works with her clients' other advisors, such as bankers, trust officers, tax advisors, financial planners, investment advisors, accountants, and insurance agents, to facilitate a holistic approach that meets their estate plan goals.

Courtney also has experience assisting clients to establish and structure nonprofit organizations and private foundations. She handles initial entity formation, exemption applications, governance documents, and charitable operations.

Education

Washburn University School of Law, J.D., 2015
University of Colorado , B.A., Economics, 2010

Bar Admissions

Colorado (2019)
Oklahoma (2015)
U.S. District Court for the Northern District of Oklahoma
U.S. District Court for the Western District of Oklahoma

Practice Areas

Wealth Planning, Trusts, and Estates
Family Business Succession Planning
Probate and Trust Administration
Estate and Gift Planning

Sectors

Cannabis