



Catherine L. Appel

Associate

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A member of the Taxation & Wealth Planning Department, Katie focuses her practice on trust and estate planning and administration, as well as tax analysis and planning.

Katie counsels a wide variety of clients on a broad range of trust and estate matters and transactions, including:

- Basic estate planning
- Sophisticated estate and gift tax planning for high-net-worth individuals
- Charitable giving
- Irrevocable gifting trusts
- Leveraging of tax exemptions and exclusions.

Working collaboratively with clients, their families and other trusted advisers, Katie takes a practical approach to helping clients define, refine and reach their goals. Specifically, she:

- Creates and implements practical and comprehensive estate plans using wills, trust agreements and other planning vehicles
- Guides fiduciaries and family members through the processes of settling estates and trusts
- Drafts and analyzes agreements settling the administration of estates and trusts
- Advises family businesses on business succession planning
- Assists with federal and state death tax planning and return filings

Additionally, Katie takes the time to educate her clients and their families to promote responsible transfers of wealth. She counsels them on the legal parameters of inheritance, planning for unanticipated events, and growing and preserving inherited assets.

Services

- Taxation & Wealth Planning
- Trust & Estate Law & Administration
- Federal Estate & Gift Tax Planning

Before Fox Rothschild

Katie previously worked as summer associate at Fox Rothschild. She also served as a judicial extern to the Honorable George A. Pagano of the Delaware County Court of Common Pleas, held a legal internship with UGI Corp. and served as a law clerk at a Philadelphia worker's compensation firm.

During law school, Katie was the President and founder of the First Generation Lawyers Group, where she worked to make Villanova Law a more inclusive place for students who are the first in their family to attend undergraduate or graduate school.

Katie was also Vice President of Villanova's Women's Law Caucus and a member of the Pro Bono Society. She also received the Dorothy Day Pro Bono Service Award for completing more than 60 hours of pro bono legal work during law school and served as a teaching assistant for the Introduction to Family Law course.

Beyond Fox Rothschild

Katie is an active member of the Philadelphia Estate Planning Council. Katie stays engaged in the Villanova Law community by mentoring current and former students interested in tax and estates and by speaking at student-organized events.

Bar Admissions

- Pennsylvania

Education

- Temple University James E. Beasley School of Law (LL.M. in Taxation, 2023)
 - Certificate in Estate Planning
- Villanova University School of Law (J.D., *cum laude*, 2019)
- Binghamton University – State University of New York (B.A., *cum laude*, 2015)