DE DarrowEverett LLP

Sarah Oster Kelly - Senior Associate

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Bio

Sarah Oster Kelly is an attorney in DarrowEverett's Private Client Group with a focus on trusts and estates, probate and fiduciary litigation, and family law. With over 10 years of experience in trust and estates law, Sarah is dedicated to providing clients with thoughtful, comprehensive legal guidance. She brings a deep understanding of the complexities involved in managing estates, navigating fiduciary responsibilities, and ensuring the seamless execution of her clients' wishes. Sarah has developed estate plans and trusts for clients to protect and provide for the assets they've spent their lifetimes acquiring, growing and preserving. Among her specialties are tax planning for high net worth individuals and families with varied and complex assets, blended families, beneficiaries with special needs, and clients experiencing life cycle transitions of all types, including divorce.

Sarah understands that effective estate and trust planning and administration requires a comprehensive approach. She works closely with her clients' trusted financial advisors, including bankers, accountants, and financial planners, to ensure a seamless strategy. With her ability to see the big picture, Sarah coordinates the efforts of the financial advisory team to ensure your goals are achieved efficiently and collaboratively.

Sarah has also built a strong reputation for advising fiduciaries—both professional and nonprofessional—on the legal and ethical complexities they encounter. Whether it's navigating liability concerns, managing beneficiary accounting, or interpreting governing documents, Sarah is well-versed in the challenges faced by executors, guardians, conservators, trustees, and custodians. Clients trust her to guide them through fiduciary responsibilities with confidence, ensuring compliance with the law while fulfilling their duties effectively.

Sarah is bilingual and provides legal counsel to both English and Spanish speakers. Beyond her legal work, she has served on the Board of Directors for the Northern Rhode Island Boys and Girls Club for over a decade. She is also a member of the Rhode Island Bar Association Executive Board and Co-Chair of the Rhode Island Bar Association Diversity, Equity, and Inclusion Committee.

Practice Areas

- Trusts & Estates
- Family Law
- Business Litigation & Alternative Dispute Resolution
- Legacy Planning
- Succession Planning
- Multi-Generational Wealth
- Complex Estates
- Tax Optimization
- Asset Protection
- Probate Administration
- Family Governance

Prior Experience

Before joining DarrowEverett, Sarah worked at a New England-based firm ranked in the National Law Journal's top 500. She also has experience working at a Providence-based boutique law firm that specialized in family law, wills and estate planning, criminal law, and contracts.

Representative Matters

- Assisted client in identifying, inventorying and forcing division of $16 million in cryptocurrency from multiple wallets and accounts, thereby allowing her to get out of crypto prior to the 2022 correction.
- Created estate plan for high-net-worth client post-divorce, covering $10 million in assets that went to the benefit of her minor children.
- Advised business owner with a diverse portfolio in developing a comprehensive estate plan that integrated advanced tax strategies and business succession planning. Our approach ensured long-term asset protection, minimized tax liabilities, and facilitated a seamless transition for future generations.
- Represented multiple clients in multimillion-dollar trust administrations and provided legal guidance on asset management and distributions.
- Represented trustee in a contested trust administration matter involving irrevocable trusts, sparing the estate unnecessary legal costs.
- Represented executor in complex probate proceedings for an estate, including filing necessary pleadings and resolving disputes among beneficiaries.
- Represented client appointed as guardian for disabled adult child in probate court. Aided client with long-term-care planning, Medicaid eligibility, and the guardianship process.
- Represented couple on their second marriage to create tailored estate plan for their blended family. Ensured clients' assets were protected and distributed according to their wishes.

Insights

- Trust Administration: Key Steps to Protecting Your Legacy - via JD Supra, November, 2024

Media Appearances

- Professional Responsibility Panel, Panelist, *Roger Williams University School of Law*, April 2023
- "Wills and Trusts 101," Presenter, *National Business Institute*, June 2019
- "The Probate Process from Start to Finish," Presenter, *National Business Institute*, April 2019
- "Lincoln Library: Estate Planning Lecture Series," Lecturer, *Oster Law Offices*, March 2019
- "Estate Planning: Top 8 Tools to Know," Presenter, *National Business Institute*, February 2019

- “Tax Cuts and Job Act Impact on Divorce Planning,” Guest Speaker, *SK Wealth Podcast*, August 2018
- “Divorce Litigation from Start to Finish,” Presenter, *National Business Institute*, May 2018

Bar Admissions

- Rhode Island
- United States District Court for the District of Rhode Island

Education

- Roger Williams University School of Law, J.D.
- Roger Williams University School of Law, Certified Mediator
- Wheaton College (Norton, MA), B.A., Political Science

Accolades

- Rhode Island Super Lawyers, Rising Stars (2017-2022, 2024)