Courtney Kelley

Of Counsel

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Courtney delivers strategic counsel to help corporations, partnerships, estates, and high net worth individuals navigate complex fiscal landscapes in estate planning and disputes.

Courtney prioritizes practical, clear guidance to help ensure clients' estate plans align with their wealth preservation goals and financial structures. She brings a holistic approach—working with clients' banking, investment, and family office advisors—to create tax efficient structures and plans that protect generational wealth.

When disputes arise, Courtney is a zealous advocate representing fiduciaries, beneficiaries, personal representatives, trustees, and administrators on matters involving contested wills and trusts, guardianships and conservatorships, and trust and estate accounting proceedings. Courtney also has extensive experience representing clients in trust modification proceedings, trust decanting, and non-judicial settlement agreements.

Before joining Holland & Hart, Courtney was a Director at Fairfield and Woods, P.C.

EXPERIENCE

Complex Trust and Estate Disputes involving:

- Undue influence
- Breach of fiduciary duty
- Tortious interference
- Beneficiary disputes
- Fraud
- Determinations of beneficiary interests
- Will and trust construction and reformation proceedings
- Will and trust contests
- Intra-family disputes
- Creditors' claims
- Beneficiary-trustee disputes
- Acquisition of the decedent's assets
- Fiduciary removal and surcharge proceedings
- Contested accounting proceedings

PRACTICES

Private Client
Trust and Estate Litigation
Trust and Estate Planning and Administration
Tax

EDUCATION

Washburn University School of Law, J.D., 2015
With Honors
Washburn Law Journal, Staff Writer, 2013-2014

University of Colorado at Boulder, B.A., 2010

BAR ADMISSIONS

Colorado

COURT ADMISSIONS

U.S. District Court for the Northern District of Oklahoma
U.S. District Court for the Western District of Oklahoma

High Net Worth Estate Planning and Administration

- Tax-optimized strategies for wills and trusts
- Revocable trusts
- Retirement benefits planning and cash flow analysis
- Irrevocable gift, GRAT, QPRT and life insurance trusts
- Asset protection trusts
- Charitable giving plans
- Lifetime family giving plans
- Intergenerational Wealth
- Business and Investment Structuring
- Estate and Gift Tax Reduction
- Generation Skipping Trust Planning

Family Office Services

- Structuring Operations
- Investment Review and Structuring
- Governance of Family Entities

PUBLICATIONS

"Class-Action Liability for Trustees After Banks v. Northern Trust," *Colorado Lawyer*, December 2021

SPEAKING ENGAGEMENTS

"Decedent's Assets: Where Did They Go, Can They Be Clawed Back, and Strategies for Recovering Assets for Aggrieved Creditors and Beneficiaries," *43rd Annual Colorado Bar Association Estate Planning Retreat*, June 9, 2023

"Common Law Marriage Webinar," *Domestic Relations and Probate Institute*, June 2022

RECOGNITION

- Colorado Super Lawyers®, Rising Stars, Estate and Probate, 2024
- *ColoradoBiz Magazine*, Colorado's Top 50 GenXY Young Professions, 2023

PROFESSIONAL AND CIVIC AFFILIATIONS

- Metro Volunteer Lawyers, Volunteer, 2021-present
- American Bar Association, Western States Regional Summit of ABA YLD Affiliates, Planning Committee Member, 2023
- Denver Bar Association
    - Nominating Committee Member

    - Young Lawyers Division, Executive Committee Member, 2022-present
- Heart of America Fellows Institute of ACTEC, Graduate
- Polite Tumor, Board of Directors, 2022