



Roger L. Shumaker

Senior of Counsel

Cleveland

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Practice Focus

- Estate planning and probate
- Transfer tax planning and audit representation
- Charitable planning
- Probate and estate administration
- Tax and benefits
- Trust administration

"With 40+ years of estate planning experience, I provide peace of mind by helping you design and implement an estate plan that will address your circumstances and objectives."

Roger is the former chair of the firm's Estate Planning Practice Group. He focuses his practice on estate planning, probate and trust administration, charitable planning, succession planning for middle-market and closely held businesses, and individual and fiduciary income taxation. He is a frequent writer and speaker on a host of estate planning, charitable, tax, and probate issues. Roger is accredited by the Ohio State Bar Association as a Certified Specialist in Estate Planning, Trust and Probate Law.

Roger earned his J.D. from Case Western Reserve University School of Law in 1976. He received a B.A., with distinction, from Manchester College in 1972.

Representative Cases/Matters

- Represents and counsels individuals and families in estate and wealth transfer planning; assists fiduciaries and family members in estate and trust administration and estate tax reporting.
- Counsels charitable organizations on charitable gift planning and governance issues.
- Advises closely held business owners on transitioning ownership and control.

Admissions - State

- Indiana
- Ohio

Education

- Case Western Reserve University School of Law
- Manchester University

Honors and Awards

- "AV" Peer Review Rated by Martindale-Hubbell
- Diamond Advisory Group's Distinguished Advisor Award (2008)

- Selected for inclusion in *Ohio Super Lawyers* (2004-2020)
- Named one of the *Best Lawyers in America*, Trust and Estates (1991-2020)
- Named "2005 Distinguished Estate Planner" by the Estate Planning Council of Cleveland
- *Strathmore's Who's Who* in American Law
- *Strathmore's Who's Who* in the Midwest

Professional Membership

- Cleveland Metropolitan Bar Association
- The Estate Planning Council of Cleveland
 - Vice-President (1989-1990)
 - President (1990-1991)
- Ohio State Bar Association (Estate Planning, Probate and Trust Law Section)
- American College of Trust and Estate Counsel
 - Member of Technology in the Practice Committee (1988-present)
 - Member of Charitable Planning and Exempt Organizations Committee (2003-present)
- Kingdom Advisors – Chartered and Certified Member

Public Service and Volunteerism

- Cleveland Museum of Art, Planned Giving Advisory Committee
- The Cleveland Pregnancy Center
- Commissioned Centurion (2010)
- Salvation Army Advisory Board (1986-present, Chair 2002-2004)
- CWRU Estate Planning Advisory Council (2002-present)
- University Hospitals Diamond Advisory Group (1992-present)
- Ohio Living Foundation Board of Trustees (1991-1998)
- Ohio Living Board of Trustees (1988-1992)
- Breckenridge Village Council (1982-98)

Alerts

- The SECURE Act may affect your estate plan

Blog Posts

- Did you get a tax cut?
- Make your charitable contributions now to maximize your tax benefits
- When can an estate plan be simple?
- A silver lining in the cloud of the market correction
- Should you loan money to family members or friends?
- The Trust Fund Loophole Part II: Policy and Practicalities
- The Trust Fund Loophole
- Estate Planning Tune-up for Retirement
- Virtual Life After Death
- Tax changes for 2014 affect wealth transfer planning

News

- "Charitable Gift Annuities"
- Seventeen attorneys at McDonald Hopkins named 2019 Ohio Super Lawyers and Rising Stars
- MH Business Exchange Episode 17 covers the role of fiduciaries
- 22 attorneys at McDonald Hopkins named 2018 Ohio Super Lawyers and Rising Stars
- 35 attorneys at McDonald Hopkins selected for inclusion in Best Lawyers® 2018
- 39 attorneys at McDonald Hopkins selected for inclusion in Best Lawyers 2017
- 24 attorneys at McDonald Hopkins named Ohio Super Lawyers and Rising Stars
- 41 attorneys at McDonald Hopkins selected for inclusion in Best Lawyers® 2016
- 26 attorneys at McDonald Hopkins named Ohio Super Lawyers and Rising Stars

External Publications

- "Are Your Digital Assets Organized?" RBMA Monthly Legal Update Digest June 2012
- Cleveland Bar Journal, June 2004 – "Charitable Lead Trusts"
- Co-Author, "Tools and Techniques of Charitable Planning," National Underwriter Co., November 2001 (3rd Edition 2014)

Speaking Engagements

- "Forced Innovation: Rethinking contributions of Highly Appreciated (Closely-Held) Property in Light of Higher Tax Rates," Think BIG Innovations in Philanthropy – 22nd Annual NOPGC Planned Giving Day, May 2, 2013
- "Estate Planning in Uncertain Times," SS&G Webinar, November 16, 2012
- "What's Top of Mind in Charitable Planning – What to Do in Anticipation of Higher Taxes in 2013," The Cleveland Foundation, November 15, 2012
- "Wealth Transfer and Philanthropic Planning in Anticipation of 'The Big Event,'" The Pathology Institute's G2 Intelligence – M&A Workshop, Ft. Lauderdale, Florida, February 2012
- "Technology Update: Time Travels Fast, Heckeling Institute on Estate Planning," 2008
- "Reducing Estate Taxes by Discount Planning," Creative Estate Planning Seminar, hosted by the Planned Giving Committee of Ronald McDonald House of Cleveland, Ohio, May 2005
- Panelist, "Legal Issues For Donors," program for Northern Ohio Council Planned Giving, November 2004
- "Bits And Bytes Meet GRITS And GRATS – Alphabetizing Estates By The Numbers," ABA Tech Show, March 2004, Chicago, IL (TechShow is considered the leading law-related technology conference and expo)