



Attorney/Firm Questionnaire

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1. Are you and your firm actively interested in representing gay, lesbian, bisexual, or transgender (GLBT) clients?

I am actively interested in and seeking representation of GLBT clients. I know that my colleagues have done so in the past and are very open to the community; however, it is not an area of focus in their practice.

2. Are you or your firm currently representing GLBT clients or have you represented GLBT clients in the past?

I have in the past and am currently representing GLBT clients. My areas of practice are estate planning, estate administration and adult guardianships and conservatorships. Estate planning offers the most opportunity to assist GLBT individuals and couples. Once I have completed their planning I consult with them as needed thereafter in the event they need to make changes to their plan.

3. Have you or your firm worked on matters/cases in which the sexual orientation, gender identity or expression of your client or your opponent played a role in the case or was relevant to the legal advice you gave? If so, what types of cases/matters have they been (workplace discrimination, housing discrimination, child custody, adoption, etc)?



Estate planning includes consideration of income, estate and gift tax law. In this regard, I have advised a client regarding whether the federal marital deduction is available for a transgender individual who married before their reassignment.

The only other closely related area to estate planning would be care for children. Most of my clients have either not had children or their children are grown. However, I have worked with a couple who became pregnant during their partnership. I prepared agreements for them regarding the custody, care and financial responsibility for the child.

4. Have you or your firm worked on matter(s)/case(s) in which you advocated for GLBT rights? If so, please describe the case(s)/matter(s).

Estate planning is transactional and (typically) not adversarial. I have not had an occasion to do so but would welcome the opportunity. Similarly, my colleagues areas of practice include business formation, nonprofit entities, health care law, etc. and I do not know of an occasion where this has been an issue.

5. Have you or your firm ever used sexual orientation, gender identity or gender expression against an opposing party on behalf of a client? If so, how?

Not to my knowledge. See number (4).

6. What areas of your or your firm's practice might be of particular interest to prospective GLBT clients (e.g., workplace/housing discrimination, trusts and estates, tax planning, child custody, adoption or surrogacy, medical decision-making, health care, insurance benefits, personal injury litigation, hate crimes, etc)?

Estate planning (which includes trusts and estates, estate administration, tax planning, medical decision making, health care)

The firm is very open to the GLBT community and if a person is seeking counsel for something not related to their GLBT identity they can choose our firm knowing that they will not be treated poorly or differently because of it. Other areas of practice in the firm include:

- *Bank Counsel*
- *Business and Corporate Law*
- *Elder Law*
- *Guardianships and Conservatorships*
- *Health Care and Behavioral Health Law*
- *Litigation and Creditor's Rights*
- *Non-Profit Law*



- *Commercial Real Estate Law*
- *Tax Law*

7. Do you or your firm have any experience advising transgender people about the specific legal issues affecting such individuals? If so, please give examples.

See number (3).

8. What is your or your firm's policy on pro bono legal assistance?

I do not know of any firm policy. I have an agreement with ACCESS AIDS that I will provide pro bono estate planning for their clients. I have also spoken to the residents of their Hampton housing programs regarding the importance of planning. In addition, I have agreed to provide pro bono estate planning for LINC (resource for cancer patients) referrals who meet their determination of financially needy.