

**Equality Virginia**  
**Attorney/Firm Questionnaire**

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**Organization/Firm:** Promise Law

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

*I am actively interested in and seeking representation of LGBT clients.*

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

*I have in the past and am currently representing LGBT clients. My areas of practice are estate planning, probate/estate administration and adult guardianships and conservatorships.*

*Estate planning offers the most opportunity to assist LGBT individuals and couples and represent all of my current LGBT clients. However, I have advised regarding estate administration and expect over time with the aging population there will be more of a need for adult guardianship/conservatorship petitions.*

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. (This research was before the 2013 decision in Windsor and the 2014 change in Virginia law permitting same-sex marriage.)*

*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 couples who became pregnant during their partnership or marriage. In those cases, 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 LGBT rights? If so, please describe the case(s)/matter(s).

*Estate planning is transactional and (typically) not adversarial. I do not handle contested matters in any of my three practice areas, but if a client had such a need I could refer them to an appropriate, LGBT friendly litigator with whom I would work or who might handle the matter entirely.*

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?

*No.*

6. What areas of your or your firm's practice might be of particular interest to prospective LGBT 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 (wills, trusts, powers of attorney, advance medical directives, and any other documents or planning needed to plan for management of lifetime financial and health care decisions and distribution of assets up death)*

*Probate/estate administration (management and/or distribution of another person's assets either during their lifetime or at their death)*

*Adult guardianship/conservatorship (court authorized management of another person's financial and medical affairs during their lifetime)*

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?

*The firm provides pro bono estate planning services to clients of ACCESS AIDS Care and similar organizations that can verify financial need.*