Kate J. Dickinson

Associate

Houston

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OVERVIEW

Board Certified in Estate Planning and Probate by the Texas Board of Legal Specialization, Kate assists clients with estate and wealth transfer planning and probate and estate administration. She prepares transfer planning documents, analyzes transfer tax issues, and forms and restructures family-owned businesses.

Kate has experience in complex federal estate, gift, and generation-skipping tax litigation and controversy matters at all stages, from reporting, audit, and settlement to docketed and non-docketed gift and estate tax cases, including in federal district and appellate courts and the tax court. She also has experience assisting clients in state-law-related fiduciary litigation matters.

Before going into private practice, Kate was a law clerk for the Hon. Don R. Willett during the Texas Supreme Court's 2013-2014 term. Kate also worked as a senior trust advisor at a national bank and trust company, counseling high-net-worth clients regarding a wide range of family and estate planning issues, including business succession planning and multi-generational wealth preservation.

AWARDS

- *Best Lawyers in America*® Ones to Watch: Trusts and Estates (2026-2027)

TOP AREAS OF FOCUS

- Private Wealth Management
- Tax

PROFESSIONAL/COMMUNITY INVOLVEMENT

- The Texas Probate Law American Inn of Court

EDUCATION AND CERTIFICATIONS

EDUCATION

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- Duke University School of Law, J.D., *cum laude*, 2013, articles editor, *Duke Law Journal*
- University of St. Thomas, B.A., *summa cum laude*, 2009, philosophy and theology

CERTIFICATIONS AND MEMBERSHIPS

- Member, State Bar of Texas, Real Estate, Probate and Trust Law Section
- Member, Houston Bar Association, Real Estate, Probate and Trust Law Section
- Member, American Bar Association, Taxation Section
- Member, American Bar Association, Trust and Estate Law Section
- Member, Houston Estate and Financial Forum
- Board Certified, Estate Planning and Probate, Texas Board of Legal Specialization
- Investment Foundations Certificate, CFA Institute

BAR ADMISSIONS

- Texas

CLERKSHIPS

- Hon. Don R. Willett, Texas Supreme Court, 2013 - 2014

SPEAKING ENGAGEMENTS

- Speaker, "If It Glitters, Is It Gold? Taking a Practical Look at Planning with Grantor Trusts," State Bar of Texas 50th Annual Advanced Estate Planning and Probate CLE, June 3–5, 2026.
- Speaker, "Drafting Gift and Estate Tax Elections," State Bar of Texas Estate Planning & Probate Drafting CLE, October 31, 2025.
- Speaker, "SLATopedia Summary: Practical Discussion about Spousal Lifetime Access Trusts," Houston Bar Association Probate Trusts & Estates Section, September 30, 2025.
- Speaker, "Tax Apportionment and Allocation," State Bar of Texas, June 3, 2025.
- Speaker, "Proper Preparation of Form 706: Practical Advice and Considerations," 26th Annual Estate Planning, Guardianship and Elder Law Conference, August 2024.
- Co-speaker: "Trusts as a Non-Entity, Handling Your First (or Next) Trust," State Bar of Texas, April 2023.