



Phyllis L. Joe, JD, LLM

SENIOR WEALTH PLANNER, SENIOR VICE PRESIDENT, SHAREHOLDER

Phone: 713-630-9690 | Email: pjoe@sentineltrust.com

Service Areas

Philanthropic Services

Personal Touch

Fiduciary Services

Wealth Planning

Education

Georgetown University Law Center, Certificate in Estate Planning, LLM in Taxation (2013)

The George Washington University Law School, JD (2009)

The George Washington University, BA in Sociology (2005)

Certifications

Board Certified in Estate Planning and Probate Law by the Texas Board of Legal Specialization (2017)

Phyllis advises on sophisticated estate and wealth planning strategies including wealth transfer, tax planning, philanthropic matters, and business succession planning on behalf of Sentinel Trust clients.

Phyllis is a talented and proactive planner who has practiced trust and estate law for almost a decade at two highly regarded firms, like Fizer, Beck, Webster, Bentley & Scroggins LLP here in Houston, focusing on the unique needs of ultra-wealthy families. There, she achieved Board Certification in Estate Planning and Probate Law. Additionally, Phyllis holds an LLM in taxation.

Phyllis volunteers as a mentor to law school students and recent law school graduates through the Mentorship Program of the Asian American Bar Association of Houston and participates in local trust and estate study groups. As a former avid tennis player, Phyllis continues to enjoy tennis and other fitness activities, and also enjoys traveling, food, and spending time with her family.

Professional Background:

- Estate Planning Associate Attorney, Fizer, Beck, Webster, Bentley & Scroggins, Houston, TX (2013–2017) – *Responsibilities included implementing estate plans and drafting wills and trust agreements, overseeing estate administration matters, preparing estate and gift tax returns, and advising clients on trust administration.*
- Estate Planning Associate Attorney, The Law Offices of Thomas Donohue, Rockville, MD (2010–2012) – *Responsibilities included drafting estate planning documents, overseeing the administration of trusts and creating trust accounts, and assisting in the preparation of individual, trust, estate, and business tax returns.*

Publications:

- *Annie Get Your Gun Trust! NFA Gun Trusts: Proceeding with Caution*, State Bar of Texas 24th Annual Estate Planning & Probate Drafting Course, October 24-25, 2013 – Houston, Texas

Professional Organizations:

- State Bar of Texas, Member
- New York State Bar Association, Member
- State Bar of Maryland, Member

- Real Estate, Probate and Trust Section of the State Bar of Texas, Member
- Houston Estate & Financial Forum, Member
- Asian American Bar Association of Houston, Member
- Houston Business and Estate Planning Council, Member

Community Involvement:

- Conference on Asian Pacific American Leadership (CAPAL), Former Member of the Board of Directors and Volunteer Legal Counsel
- Tahirih Justice Center, Former Volunteer Pro Bono Attorney