



Phyllis L. Joe, JD, LLM

LEAD WEALTH PLANNER, VICE PRESIDENT

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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 is active with her college and law school alumni networks serving the community and participates in trust and estate study groups locally.

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.*

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