

Stevens & Lee

Powerful partnerships. Standout solutions.



Heather Eshelman McCusker

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Areas of Focus

Practice

Wealth Planning, Trusts and Estates

Industry

Higher Education

Heather is Head of the firm's New Jersey Estates and Trusts practice. She concentrates her practice in wealth planning, estates and trusts and fiduciary matters. Heather is a trusted advisor to individuals, families, business owners, executors and trustees in a range of areas including estate planning, trust and estate administration, taxation, strategic planning for generational wealth transfer, business succession planning, guardianships, probate matters before the Surrogates' Courts, contested estates and estate and inheritance tax controversies on the federal and state levels, as well as charitable planning and planned giving services for individual and institutional clients.

Central to Heather's work and dedication to her private clients is her close collaboration with her clients' other professional advisors with the shared goals of protecting the client's family, mitigating taxes, preserving their wealth and passing their legacy on to the next generation.

Heather is a frequent lecturer on a broad range of tax, trust, estate and fiduciary-related topics and presents before the community and professional education organizations for accountants, financial planners and advisers, attorneys and insurance professionals. She is a graduate of Class II of the Mid-Atlantic Fellows Institute sponsored by the American College of Trust and Estate Counsel (ACTEC).

Heather served as a judicial clerk for the Honorable Paulette M. Sapp-Peterson, P.J.Cv., New Jersey Superior Court. While in law school, she was an editor of the Syracuse Journal of International Law and Commerce.

Affiliations

- New Jersey State Bar Association
- Mercer County Bar Association
- Princeton Bar Association
- Mercer County Estate Planning Council
- Princeton Child Development Institute, former Trustee
- Princeton Area Community Foundation
 - Board of Trustees
 - Member, Professional Advisors Committee
- D&R Greenway Land Trust, Board of Trustees

Education

- Syracuse University College of Law, J.D.
- Villanova University, B.A., *cum laude*

Bar Admissions

- New Jersey

Court Admissions

- U.S. District Court for the District of New Jersey