

Stacy M. Reid Monroe

Attorney

1065 East Morehead Street
Charlotte, North Carolina 28204
P :704.998.2213
F 704.376.1628
smonroe@jahlaw.com



My goals as a trusts and estates attorney are to help clients plan for what matters the most, their family's wellbeing after they are gone and to guide their family through the probate process so they can focus more on remembering their loved one's life and legacy.

Stacy Reid Monroe is a seasoned **trusts and estates** attorney with almost two decades of paralegal experience working in estate settlement at well-respected law firms. Her principal areas of practice are estate planning and **estate administration**. Stacy understands how a succinct estate plan translates into a streamlined estate administration and tasks that fiduciaries face when serving as an Executor and Trustee in North and South Carolina. You can count on Stacy to listen to your goals, thoughtfully advise and craft estate planning documents that meet your objectives and resolve any issue that arises in estate administration.

Representative Experience

- Prepares simple and pour-over wills, revocable and irrevocable trust agreements, general and health care powers of attorney and living wills for clients in all phases of life.
- Prepares various court filings throughout the estate administration until fiduciary is discharged of duties to serve.

Practices

Trusts & Estates
Asset Protection Planning
Estate Administration

Bar Admissions

North Carolina
South Carolina

Education

Charlotte School of Law (JD, , 2013)
Converse College (BA, , 1995)

Associations

Professional

- **North Carolina Bar Association**
 - Estate Planning & Fiduciary Law Section
 - Council Member
 - Member, Inclusion, Diversity, Equity, and Access Committee (IDEA)
 - Co-Chair, Estate Administration Manual Committee
- **South Carolina Bar Association**
 - Probate Planning Estate and Trust Section
- **Mecklenburg County Bar Association**

- Prepares estate tax returns for both taxable and portability purposes and gift tax returns.
- Prepares corporate formation and organizational documents and annual reports.

Speaking Engagements

- Speaker, “*Federal and State Recent Developments*,” 44th Annual NCBA Estate Planning & Fiduciary Law Conference, Kiawah Island, SC, (July 2023)

Honors

- **Super Lawyers®** North Carolina – Rising Star – Estate & Probate (2023)
- **The Best Lawyers in America®** – Ones to Watch: Trusts & Estates Law (2023-2025), Nonprofit/Charities Law (2024, 2025), Family Law (2024, 2025)
- **Southern Regional BLSA Journal**, Editor-in-Chief and Senior Editor, Charlotte School of Law
- CALI Award (highest grade) – Advanced Writing Course, Charlotte School of Law
- Mortar Board National Honor Society, Converse College
- Spirit of Converse Award, Converse College
- Lambda Epsilon Chi National Honor Society, King's College
- West Publishing Award for Outstanding Scholastic Achievement, King's College

- Estate Planning & Fiduciary Law Section

- **Meritas Law Firms Worldwide**

- Meritas Black Lawyers Forum
 - Leadership Council Member

Community

- Antonelli College, Online Paralegal Program, Paralegal Advisory Board (2013-2018)

Community

About Our Firm
Recognition