



Service Areas

Trusts + Estates
Private Client Services

Education

Temple University
LL.M. in Taxation

New York University
Juris Doctor

University of Rhode Island
Bachelor of Arts

Admissions

Pennsylvania

Affiliations + Recognitions

Pennsylvania Bar Association
Member

Philadelphia Bar Association
Member

Philadelphia Estate Planning Council
Member

Philadelphia Zoo Gift Planning Advisory
Council
Member

Joan helps individuals protect their assets and their legacies.

Highly credentialed in tax law – and highly skilled at listening – Joan has a knack for creating plans to preserve and transfer wealth that truly reflect each individual client's needs. With prior experience as an educator, Joan has the unusual ability to explain key parameters of prevailing law in plain English, enabling her clients to make informed, thoughtful choices.

Joan's clients include families and individuals, including executives of public companies and owners of closely held businesses, and fiduciaries. Her experience includes not only general estate and gift planning and taxation, but also succession planning for closely held businesses, and estate and trust administration.

In addition to her law degree, Joan has special certification in taxation. She is a longtime member of the Philadelphia Estate Planning Council, has served in leadership roles for the Philadelphia Bar Association, and volunteers her time as a member of the Planned Gift Advisory Council for the Philadelphia Zoo.

BEYOND McCAUSLAND KEEN + BUCKMAN

Dedicated equestrian – dressage and cross country
