

# Cozen O'Connor Expands Private Client, Trusts and Estates Group with Six New Attorneys; Opens New South Florida Office in Boca Raton

Thursday, September 2, 2021

**Boca Raton, Fla. – September 2, 2021** – Cozen O'Connor strengthened its Private Client, Trusts and Estates Practice in South Florida with the addition of six attorneys. The firm also expands its domestic footprint with the opening of a new office in Boca Raton, Florida. The attorneys, from the boutique firms Morris Law Group and Elder Law Associates PA, are Stuart R. Morris, Ellen S. Morris, Howard S. Krooks, Gregory S. Bloshinsky, Michael S. Gross, and Cassandra Jelincic. The attorneys will all be located in the new office. Stuart Morris will be the office managing partner of the Boca Raton office.

"Private client services is such an integral part of Cozen O'Connor's focus. Now more than ever, we want to be able to be closer to our clients and a part of their community. With the opening of this new office in Boca Raton, I am excited that we are continuing our 'boots on the ground' approach when it comes to taking care of our clients," said Michael J. Heller, Cozen O'Connor's Executive Chairman and Chief Executive Officer. "It is such a rare opportunity to launch an office with the depth of experience and pedigree this team brings to the nuanced world of private client services and the complicated elder law and fiduciary litigation practice."

"Sophisticated estate and tax planning for high net worth individuals and multi-generational family offices requires a very strong level of trust and understanding. When you can bring a team that is so well versed in the areas of succession planning, tax strategies for liquidity events, charitable giving, elder law, and fiduciary litigation and build a practice where our clients live, we are demonstrating how much Cozen O'Connor values the need for contact on a personal level," said Helene S. Jaron, chair of Cozen O'Connor's Private Client, Trusts and Estates Practice. "This is a tremendous opportunity to not only enhance our capabilities within this space, but to show our commitment to our clients' needs as we continue to expand our service offerings with the addition of an elder law practice."

"The business law practice and the private client services practice are so finely entwined that they require dedicated teams to be able to service these often complex financial transactions. Having a team in place that understands the complexities of this convergence of law, as well as real estate and tax attorneys, for example, to support them, is a tremendous benefit to our clients," added Jeffrey A. Leonard, co-chair of Cozen O'Connor's Business Law Department.

"I am truly honored to be a part of Cozen O'Connor's already robust Private Client, Trusts and Estates Practice and working within the community I have grown with and supported for most of my career. This will benefit our clients by our ability to offer a much wider array of services," said Stuart R. Morris.

"For Cozen O'Connor to establish such an impressive foothold in South Florida, it reinforces the dedication they have not just to these clients, but to the community as a whole and a willingness to serve both," said Ellen S. Morris.

Howard S. Krooks added, "Elder law is growing as our senior population grows and Cozen O'Connor is leading the way for multi-faceted firms to bring this practice area to the communities they serve."

Stuart R. Morris is board certified in wills, trusts and estate by the Florida Bar and also a certified public accountant. His core focus has been on estate and gift tax planning, wills and trusts, business structuring and asset preservation, succession planning, and domestic and international tax planning. In addition to being licensed in Florida, Morris is licensed in Colorado and the District of Columbia.

## Related Practice Areas

- Private Client, Trusts and Estates

Morris is currently serving as chairman of the Junior Achievement of South Florida Charitable Foundation, Inc. and serves on the Junior Achievement board of directors. He is a member of the Executive Committee for American Israel Public Affairs Committee (AIPAC) of South Palm Beach County, in addition to holding several board positions in privately held businesses and charitable foundations. His ties to the community have included the board of directors of SOS Children's Village of Florida, Inc.

Morris has been a featured speaker on the topics of wealth preservation for business owners and family offices and has given lectures before many major financial advisory firms, the New York State Bar Association, the New York University Institute of Taxation, Stetson University Law School, and the Broward Health Foundation.

Ellen S. Morris, previously the founding partner of the law firm of Elder Law Associates, brings more than three decades of experience to the field of special needs and elder law transactions and litigation, fiduciary and guardianship litigation, nursing home residents' rights litigation, as well as wills, trusts, and advance directives and administration of estates and trusts.

Morris began her career as an assistant state attorney for Miami-Dade County, Florida, under the direction of State Attorney Janet Reno. Currently, she is the co-chair of the Joint Public Policy Task Force for the Elderly and Disabled for the Elder Law Section of The Florida Bar and the Academy of Florida Elder Law Attorneys (AFELA). She was the former chair of the Elder Law Section of The Florida Bar; she was legislative chair for the section for six years and served in every executive council position. She has spoken statewide and nationally on the areas of practice in which she concentrates.

Howard S. Krooks brings over three decades of experience dedicated to the trust and estate planning and elder law practices. He is a certified elder law attorney by the National Elder Law Foundation as accredited by the American Bar Association. He is a past president of the National Academy of Elder Law Attorneys (NAELA), is chair-elect of the Florida Bar Elder Law Section and is a past chair of the New York State Bar Association Elder Law Section. Krooks has developed a professional practice devoted to seniors and special needs individuals, representing clients and their families in connection with estate planning, asset preservation, supplemental needs trusts and estate, and trust administration.

Krooks has written work featured in *Guardianship Practice in New York State* and *Estate Planning and Will Drafting in New York*, both published by the New York State Bar Association. He was lauded for his efforts on behalf of NAELA to enact the Special Needs Trust Fairness Act, which was signed into law by President Obama on December 13, 2016, and received the Outstanding Achievement Award from the New York State Bar Association Elder Law Section for his efforts. He also received the Outstanding Member of the Year Award from the Florida Bar Elder Law Section. He has spoken extensively around the United States and is a sought-after expert speaker in the field of elder law.

Gregory S. Bloshinsky is board certified in wills, trusts, and estates by the Florida Bar and has built a practice focused on the secure transfer of generational wealth via complex wills and trusts, estate and gift tax planning, and probate and trust administration. He is a trusted advocate for family offices for trust administration services. He brings a depth of knowledge in the areas of simple and complex wills and trusts (revocable, irrevocable, dynasty, credit shelter, qualified terminable interest, qualified domestic relations, for minors, special needs, charitable, grantor retained annuity, and qualified personal residence). He has been sought after for his work in structuring advance directives, including living wills, health care surrogates, and durable powers of attorney.

Michael S. Gross is board certified in wills, trusts and estates by the Florida Bar and focuses his practice in the areas of tax, estate and gift tax planning, charitable giving, trust and estate

administration, business structuring, and wealth preservation. He brings significant experience working with private family offices and has a reputation for drafting cohesive and complex estate planning documents, including irrevocable life insurance trusts, charitable and qualified residence trusts, family dynasty trusts, and grantor retained annuity trusts, as well as generation skipping transfer tax planning. In addition to his license in Florida, Gross is licensed in Maryland.

Cassandra Jelincic has focused her practice in the areas of elder and special needs law and litigation, including guardianship and fiduciary litigation. She has extensive experience with the preparation of estate planning documents, including wills, trusts and advance directives, Medicaid and disability planning, and asset preservation.

Jelincic earned her Bachelor of Science in telecommunications with a minor in communication studies from the University of Florida. She attended Louisiana State University and received her J.D. and a Graduate Diploma in comparative law. She served as the vice president of the Trial Advocacy Board and as a member of the LSU Law Chancellor's Student Advisory Board. Jelincic is a member of the following: Susan Greenberg Family Law American Inn of Court of the Palm Beaches, the Craig S. Barnard American Inn of Court LIV, and the Real Property, Probate, Trust Law Section of the Florida Bar. She is currently serving her second term as the treasurer for the South Palm Beach County Florida Association for Women Lawyers (SPBC FAWL).

### **About Cozen O'Connor**

Established in 1970, Cozen O'Connor has over 925 attorneys who help clients manage risk and make better business decisions. The firm counsels clients on their most sophisticated legal matters in all areas of the law, including litigation, corporate, and regulatory law. Representing a broad array of leading global corporations and middle-market companies, Cozen O'Connor serves its clients' needs through 33 offices across two continents.