

Kari D. McKelvie

Paralegal

Troy

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Kari McKelvie has more than 30 years of experience assisting attorneys with the formation of business entities and ongoing legal compliance of business entities; corporate conversions; merger and acquisition transactions; preparation of and filing IRS applications and elections; drafting governance and transaction documents; organization of and review of due diligence material; implementing business succession planning strategies; ordering UCC searches, preparation of UCC summaries and UCC filings; and any other special requests.

Kari has experience assisting attorneys with estate planning matters, including preparing estate planning documents, implementing succession strategies, summarizing estate plans, preparing flowcharts illustrating estate plans, trust funding, trust administration, and any other special requests.

She also assists attorneys with purchase and sale transactions, ordering and reviewing title commitments and surveys, preparing closing documentation, recording real estate documents, and any other special requests.

practices & industries

Business
Tax
Real Estate
High Net Worth

education

Macomb County
Community College, A.A.S.

PROFESSIONAL AFFILIATIONS

- State Bar of Michigan – Paralegal Section

CERTIFICATIONS

- Carta Partner Certification (Proficient, Premier and Expert)