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Barbara A. Simanek

of counsel

Barbara has more than 30 years of experience in tax, estate planning and personal wealth law. She advises clients on every aspect of estate planning and administration, including the coordination of employee benefits with overall estate objectives.

Her practice includes tax planning, business succession planning, elder law and the administration of significant estates. She regularly evaluates and implements a range of estate planning techniques—such as QPRTs, GRATs, multigenerational trusts, disclaimers, stock option transfers, family limited partnerships and split-dollar arrangements, while also drafting wills and a wide variety of trusts, including credit shelter, revocable, irrevocable "Crummey," defective grantor and Florida "flite" trusts. A key part of her work involves integrating retirement plan assets into comprehensive estate plans and advising on elder law considerations.

Prior to her work in law, Barbara spent 15 years in financial services, where she served as Vice President Product Manager. In that role, she developed and managed a broad suite of financial products for small business, middle market, and large corporate clients including deposit accounts, employee benefit programs, cash management services, investment products and oversaw business deposit operations.

BAR ADMISSIONS

- Pennsylvania
- Florida
- District of Columbia

PRESENTATIONS

- "Estate Planning in Florida: From A to Z," National Business Institute, Aug. 22, 2025

HONORS | AWARDS

- *The Best Lawyers in America®* Trusts and Estates, 2024-2025

COMMUNITY

- Smith College, Chair of Planned Giving for Class of '73
- Duquesne University, Adjunct Professor, Estates and Trusts, 2017-2023

CONTACT

bsimanek@porterwright.com
412.235.1466
239.593.2923
202.778.3043
www.porterwright.com

6 PPG Place
Third Floor
Pittsburgh, PA 15222

9132 Strada Place
Suite 301
Naples, FL 34108

2020 K Street, NW
Suite 600
Washington, DC 20006

EDUCATION

Duquesne University School of Law, J.D., *cum laude*, 1995

University of Pittsburgh, M.B.A, 1982

Smith College, B.A., *cum laude*, 1973

SERVICES

Tax, Estate Planning & Personal Wealth