WH | BURKLEY
ATTORNEYS AT LAW

Cullen M. Fischel

Paralegal | Tax & Private Wealth

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OVERVIEW

Cullen Fischel is a Paralegal in the Tax & Private Wealth Group at WH Burkley, where he provides comprehensive support to attorneys and clients throughout every stage of the estate planning and administration process. Leveraging a strong background in financial principles, Cullen assists in developing and executing tailored strategies for wealth preservation and transfer.

His experience spans the full lifecycle of estate and tax planning, allowing him to support clients through attorney support in the following areas:

- Strategic Planning: Preparing detailed schematics, flowcharts, summaries, and financial calculations to help clients evaluate their options and visualize their wealth transfer strategies during the initial planning phase.
- Plan Implementation: Drafting foundational estate planning documents, including wills, trusts, powers of attorney, and healthcare directives.
- Tax & Compliance Reporting: Preparing trust income tax returns, gift tax returns, and estate tax returns for clients with specialized reporting and compliance requirements.

EDUCATION

- Franklin & Marshall College, B.A.

FOCUS

- Tax & Private Wealth

OFFICE

- Cleveland