JOSEPH M. MENTREK

CHAIR, ESTATE AND SUCCESSION PLANNING AND ADMINISTRATION

As Chair of the Estate and Succession Planning and Administration group, Joe Mentrek provides counsel to high-net-worth individuals, closely held business owners, corporate executives and not-for-profit organizations.

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With a background in both financial planning and the law, Joe works diligently with his clients and their advisers to develop creative legal strategies and tax-advantaged solutions to achieve their wealth transfer and business transition goals.

Joe's broad-based approach to estate planning incorporates progressive strategies with time-tested techniques to achieve clients' desired results. His wide-ranging skills and practical experience allow him to integrate diverse disciplines including estate plan design and implementation, tax accounting and compliance, process-oriented succession planning, employee benefits and executive compensation, personal wealth management, family governance, business organization and governance, retirement planning, investment planning and risk management.

In 2023, The American College of Trust and Estate Counsel (ACTEC) offered Joe membership as a Fellow of the College. ACTEC is an organization of nearly 2,400 trust and estate lawyers and law professors who have been elected by their peers in recognition of having made outstanding contributions to the practice of trust and estate law.

Joe has been recognized as a Leading Lawyer in the *Chambers High Net Worth* Guide from 2018-2024 in Band 1 for Ohio: Private Wealth Law. Chambers HNW is the only independent directory specifically aimed at the private wealth market that ranks law firms according to their private client disciplines.

Joe is described by *Chambers HNW* as "a highly experienced estate planning attorney who has an excellent reputation for his practice. He is an expert in dealing with family succession matters. He uses a pragmatic approach to his legal advice. Multiple sources describe Joe as an innovative and intellectually creative estate planner, with a strongly collaborative working style and a proactive approach to client relationships. Joe is one of the best estate planners in town; he is very knowledgeable and generous with his time. He is a dedicated and talented estate attorney. Joe has an incredible depth of technical knowledge and possesses the highly valued skill of articulating complex planning techniques into terms that the client can understand. Joe is strong on tax and is also very tuned in to family dynamics. Joe possesses a great knowledge of income tax laws and regulations. Joe's background in estate, trust, and tax planning is excellent and well-suited to this market. Joe is very intelligent and very responsive. He thinks through issues in the long term. He's one of my go-to people; he understands the nuances of the family and the finances and makes a very responsible and appropriate solution. He's very personable, asks insightful questions, and is in tune with family and generational issues and ways to communicate with clients. Clients feel that he really cares about their well-being. He deals with very sophisticated concepts, and he's able to explain them to the clients in a way that they can understand. What we do is very foreign to them, and they need to understand why we're recommending certain things; he can bring it down to a level that the client can understand."

Prior to joining Calfee, Joe practiced as a public accountant for more than 18 years, most recently serving as vice president and director of the Wealth Center at Meaden & Moore, Ltd., a CPA and business consulting firm. Joe joined Calfee in 2015.

HONORS & RECOGNITIONS

- Chambers High Net Worth, Private Wealth Law, Band 1, Ohio (2018-2024)
- The American College of Trust and Estate Counsel, Elected as a Fellow (2023)
- The Best Lawyers in America®, Closely Held Companies and Family Businesses Law, Litigation - Trusts and Estates, Tax Law, Trusts and Estates (2018-2025)
- Best Lawyers "Lawyer of the Year" in Closely Held Companies and Family Businesses Law (2024)
- Distinguished Estate Planner Award, The Estate Planning Council of Cleveland (2015)

EDUCATION

J.D., Ohio Northern University Pettit College of Law, 1985

B.S., Business Administration, *with high distinction*, Ohio Northern University, 1982

PROFESSIONAL & COMMUNITY

- American College of Trust and Estate Counsel (ACTEC), Fellow (2023)
- UCP of Greater Cleveland, Board of Directors
- The Estate Planning Council of Cleveland, Past President and Trustee
- Tax Club of Cleveland, Member
- Cleveland Metropolitan Bar Association Estate Planning Institute, Former Chairman (2011)
- Cleveland Metropolitan Bar Association, Member
- Ohio State Bar Association, Member

- American Bar Association, Member
- Cleveland Clinic Partners in Philanthropy
- University Hospitals Diamond Advisory Group
- Planned Giving Advisory Board of the American Red Cross (Cleveland)

PRESENTATIONS & PUBLICATIONS

Joe frequently writes and speaks on tax and estate planning matters.

Presentations

- Cleveland Tax Institute
- The Cleveland Estate Planning Institute
- The Ohio and Cleveland Society of Certified Public Accountants
- The Northern Ohio Planned Giving Council
- The Marvin R. Pliskin Advanced Probate and Estate Planning Seminar

Most notably, Joe is responsible for the annual update of the Cleveland estate planning community on the proceedings of the annual Heckerling Institute on Estate Planning.

Publications

- "Selecting the Perfect Fiduciary," *Crain's Cleveland Business (*October 30, 2019)
- "Selecting the Perfect Trustee," *Crain's Cleveland Business* (November 12, 2018)

LICENSED IN

Ohio