SpencerFane

Serena O'Neil

Partner

Contact

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Overview

Serena O'Neil has a person-centered estate planning practice in which she partners with her clients to create estate plans that put their wishes at the forefront. Just as every person is unique, she strongly believes that every client deserves a uniquely designed estate plan to fit their family, wealth, charitable, and business goals.

She often works with high-net worth individuals and business owners to craft estate plans that meet their goals of business succession planning, tax planning, and charitable giving. As part of her complex estate planning practice, Serena drafts many different types of revocable and irrevocable trusts for clients. These trusts include asset protection trusts, grantor and non-grantor spousal limited access trusts, intentionally defective grantor trusts, self-settled trusts, children's trusts, annual exclusion gifting trusts, incomplete gift non-grantor trusts, single asset revocable trusts, charitable trusts, supplemental needs trusts, retirement trusts, real estate investment trusts, farm trusts, and cabin trusts.

Serena encourages business owners to create written business succession plans and assists them in thinking through the key people and actions their business needs to succeed for generations to come.

Additionally, Serena works with clients to establish the traditional "core" estate planning documents that every plan needs – wills, financial power of attorneys, health care directives, and as needed, revocable trusts. Her approach with every estate plan is to identify cost-effective options to transfer assets at death outside of court proceedings, especially given that a methodical approach now can save her clients and their families thousands of dollars by avoiding probate later.

Serena also guides families and corporate fiduciaries through probate and trust administrations. Probate and trust administrations may involve preparing court pleadings, coordinating preparation of tax returns, counseling fiduciaries should tension arise with beneficiaries, obtaining appraisals of personal property, real estate or businesses, and drafting inventories and accountings.

Her practice also includes working with families who have relatives in need of a guardianship to manage the person's daily needs, a conservatorship to manage the person's financial needs, or to obtain or dissolve a civil commitment. Serena prepares the copious amounts of documentation necessary to establish a guardianship or conservatorship with the court, and to meet the annual reporting and notices required by the court. She is comfortable in the courtroom and advocates for families.

When a family, business, contract, guardianship, conservatorship, fiduciary, probate, or trust dispute arises, Serena offers her clients creative approaches and solutions to resolve litigation as efficiently and economically as possible. Serena began her legal career as a litigator and has maintained an active litigation practice in addition to her estate planning practice. She represents individual beneficiaries, charitable beneficiaries, individual trustees, corporate trustees, charitable trustees, creditors, business owners, businesses, individuals, charities, foundations, and interested parties in disputes.

Serena enjoys providing legal services with cultural competence at its core, and welcomes working with and learning from clients of diverse backgrounds, beliefs, cultures, and communities.

Education

- Washington University in St. Louis, 2024 (LLM)
- University of St. Thomas School of Law, 2017 (J.D.), *magna cum laude*
- Wartburg College, 2014 (B.A.), *summa cum laude*

Bar Admissions

- Minnesota, 2017

Court Admissions

- U.S. District Court for the District of Minnesota, 2018

Community Involvement

- High School Mock Trial Tournaments, Volunteer Judge
- University of St. Thomas School of Law Mentor Externship Program, Mentor

Distinctions

- *Best Lawyers in America*, Ones to Watch, 2023-2026
- *Minnesota Super Lawyers*, Estate and Probate Rising Star, 2023-2025
- Minnesota State Bar Association, North Star Lawyer, 2019

Memberships

- Minnesota State Bar Association, Probate and Trust Section, Member
    - Diversity and Inclusion Committee, Member
- Hennepin County Bar Association

Presentations and Publications

- “Impact of Blended Families on Estate Planning: Effective Trust Structures, Beneficiary Challenges, Litigation,” BARBRI (formerly Strafford) webinar, November 2025

- “Structuring Trust-to-Trust Transfers to Address Deficiencies in Existing Irrevocable Trusts,” BARBRI webinar, November 2025
- “Planned Succession: Estate Planning Considerations Prior to Exiting the Business,” Tennessee Bankers Association Trust & Wealth Management Conference, October 2025
- “Planned Succession: Estate Planning Considerations Prior to Exiting the Business,” MOKAN Trust & Financial Services Conference, May 2025
- “Holding Down the Fort: Planning for Vacations to Exiting the Business and Everything in Between,” Level-Up Ladies Symposium September 2024
- “Planned Succession: Estate Planning Considerations Prior to Exiting the Business,” Spencer Fane Advantage CLE, June 2024
- “5 Documents Needed for Your Estate Plan,” Minnesota CLE, Estate Planning for the Non-Specialist Seminar, February 2024
- “Estate Plan Starter Pack (and a Few Upgrades)” – MinnesotaCLE, February 2022
- “Structuring Private Family Trust Companies and SPEs for High Net Worth Individuals and Families,” Strafford webinar, August 2022
- “Why Your Clients’ College-Age Children Need Health Care Directives,” *InsuranceNewsNet*, October 2021
- “An Essential Healthcare Checklist for College Students,” *Advisor Perspectives*, September 2021
- “Selecting the Right Trust for Your Client: A Scenario-Based Discussion,” Minnesota CLE, August 2021
- “Selecting Trustees: A Panel Discussion,” Minnesota CLE, June 2021