



THERESA A. MURPHY

Paralegal

Phone: 216.928.2937

tmurphy@walterhav.com

SERVICES

Estate Planning
Probate & Trust Administration
Tax & Wealth Management

EDUCATION

David N. Myers University, 1988, ABA Accredited Paralegal Certification
The Ohio State University, B.A., 1981, Criminology/Criminal Justice

LICENSED TO PRACTICE

Notary Public

OVERVIEW

Theresa A. Murphy is a paralegal on Walter | Haverfield's Tax and Wealth Management team, concentrating on trust and probate administration. She has over three decades of experience. Her primary responsibilities include meeting with clients, gathering information regarding assets, valuation, and transfer of assets, and preparation of federal estate tax returns, fiduciary income tax returns, and final income tax returns. In addition, she has experience with IRS audits of estate tax returns. She is also responsible for the general management of all the firm's estate and trust accounts, including preparing annual accountings and paying expenses.

Theresa is responsible for preparing all documents required by the probate court, including inventories and accounts. She calculates life estates and prepares all detailed calculations to fund trust accounts. Theresa's compassion toward people who are dealing with the loss of a loved one make her an invaluable and most trusted member of our team. Clients count on Theresa to guide them through the sometimes difficult world of probate court at a particularly difficult time in their lives.

Theresa graduated from The Ohio State University in 1981 with a B.A. in criminology and criminal justice. After graduating, she attended David N. Meyers University in Cleveland and earned her paralegal certification. At the time, Meyers was the only university with an ABA-accredited paralegal program. She joined Walter | Haverfield in 1985.

ASSOCIATIONS

- Cleveland Metropolitan Bar Association
- Cleveland Area Paralegal Association