



## Crystal West Edwards

Principal

Morristown, NJ

T: (973) 889-4263

E: CWEdwards@pbnlaw.com

Crystal West Edwards is a Principal in the Wealth Preservation Group and has extensive experience in the areas of elder law, special needs planning and advocacy, estate planning and estate administration, and counseling.

Crystal is highly experienced working with the legal problems of aging individuals and those with disabilities. Crystal counsels seniors, individuals with special needs and their families with issues pertaining to complex estate and tax planning, asset preservation, eligibility for means-tested government benefits, fiduciary appointments and representation and advocacy. She is also a trusted advisor to financial institutions and corporate fiduciaries with judicial and administrative accountings and counseling regarding initial or continued means-tested government benefits eligibility for its trust beneficiaries.

Crystal is a sought after speaker and has authored numerous publications on the topics of elder and disability law, estate planning, special need trusts and government agencies. She is Co-chair of the Diversity, Equity, and Inclusion Committee of the National Academy of Elder Law Attorneys (NAELA) and a Fellow to the American College of Trust and Estate Counsel (ACTEC).

## Recognitions

*No aspect of this or any advertisement has been approved by the Supreme Court of New Jersey. For ranking methodologies, please see [here](#).*

- New Jersey Institute on Continuing Legal Education - Distinguished Service Award (2021)
- Profiles in Diversity Journal - Women Worth Watching (2021)
- Certified Elder Law Attorney (CELA) by the ABA Accredited National Elder Law Foundation - the only African American attorney in NJ holding this designation.
- New Jersey Super Lawyers® (2019 - 2024)
  - Top 50 Women (2024)
- New Jersey Rising Stars® (2010-2018)
- *New Jersey Law Journal* - Distinguished Leader Award Recipient (2017) ; Top Women in Law (2016); New Leaders of the Bar (2014)

## Crystal West Edwards Cont.

- Garden State Bar Association - Young Lawyer Award Recipient (2014)

### Memberships

- Co-chair, Diversity, Equity, and Inclusion Committee, National Academy of Elder Law Attorneys (NAELA)
- Former Member, Board of Directors, National Academy of Elder Law Attorneys (NAELA)
- Fellow, American College of Trust and Estate Counsel (ACTEC), the only African American attorney in New Jersey elected to the College.
- Board of Directors, New Jersey Chapter NAELA
- Diversity Committee, New Jersey State Bar Association
- Elder and Disability Law Section, New Jersey State Bar Association
- Diversity and Inclusion Trusted Advisors, Dickinson School of Law of the Pennsylvania State University
- Board of Directors of the Dickinson Law Alumni Society of the Pennsylvania State Alumni Association
- Past President, New Jersey Chapter, NAELA
- Past President, Garden State Bar Association
- Life Member, Garden State Bar Association
- Member, National Bar Association
- Member, New Jersey Women Lawyers Association
- Member, Advisory Board to the Rutgers Center for Adult Autism Services
- Certified Elder Law Attorney by ABA Accredited National Elder Law Foundation
- Member, Cathedral International, Perth Amboy, New Jersey
- Member, Alpha Kappa Alpha Sorority, Inc.
- Former Adjunct Faculty Member, Kean University, Union, New Jersey

### News

*No aspect of this or any advertisement has been approved by the Supreme Court of New Jersey. For ranking methodologies, please see [here](#).*

- 18 Porzio Attorneys Named to 2024 New Jersey Super Lawyers® and Rising Stars® Lists, 3/25/2024
- Twenty Porzio Attorneys Recognized in 2023 New Jersey Super Lawyers and Rising Stars Lists, 5/11/2023

## Crystal West Edwards Cont.

- Porzio's Crystal West Edwards to Receive Distinguished Service Award by NJICLE, 9/08/2022
- Crystal West Edwards Receives the Highest Video Acclaim for "Should Your Adult Child be a Co-Signer on Your Bank Account?", 6/07/2022
- 22 Porzio Attorneys Selected for Inclusion on 2022 New Jersey Super Lawyers List, 4/06/2022
- Congratulations to Crystal West Edwards for Being Named one of 2021's "Women Worth Watching" by Profiles in Diversity Journal, 8/19/2021
- Porzio's Family of Companies Receive Community Impact Award, 11/22/2019
- Porzio Welcomes Principal Crystal West Edwards to the Firm, 9/17/2019

## Articles

- Social Security Administration Changes ISM Rules for SSI Recipients, 4/15/2024
- Quarterly Tax Updates: January 2024, 1/16/2024
- Corporate Transparency Act Becomes Operational, 1/16/2024
- Year-End Tax Tips: 5 Smart Strategies for 2023, 3 Important Changes for 2024, 12/14/2023
- 2023 Q3 Tax Updates, 7/20/2023
- Lessons from the Lynnette Harris and Leigh Ann Conley Cases, 7/20/2023
- Tax Short Shorts, 7/20/2023
- Net Unrealized Appreciation: Opportunities in Your Company's Retirement Plan, 7/20/2023
- More IRS Scrutiny of Hobby Losses, 7/20/2023
- Retirement Report, 7/20/2023
- Qualified Small Business Stock: More Smoke than Fire, 7/20/2023
- 2023 Q2 Tax Updates, 4/27/2023
- A Look At President Biden's Budget Tax Proposals, 4/27/2023
- Crypto Corner, 4/27/2023
- Golden Passports & Moving to Puerto Rico, 4/27/2023
- Tax Shorts, 4/27/2023
- Moratorium on Medicaid Terminations Scheduled to End on April 1, 2023, 2/08/2023
- IRS Delays \$600 Reporting Threshold, 1/24/2023

## Crystal West Edwards Cont.

- The Far Side, 1/24/2023
- The Silver Lining of Inflation, 1/24/2023
- Understanding the Once-A-Year Rollover Rule, 1/24/2023
- 2023 Q1 Tax Updates, 1/24/2023
- 2022 Year-End Tax Planning , 12/13/2022
- The Complexity of Charitable Contributions, 12/13/2022
- Converting Traditional IRAs to Roth IRAs, 12/13/2022
- Crypto Investments, 12/13/2022
- Delaying Income and Accelerating Expenses, 12/13/2022
- Looking Ahead: Tax Rates, Gift & Estate Exemptions and Tax Legislation, 12/13/2022
- Should You Harvest Losses?, 12/13/2022
- 2022 Year-End Tax Planning Resources, 12/13/2022
- "From the Adult System to Long-Term Care: A Comparative Approach to Planning for Aging Adults With Intellectual and Developmental Disabilities," New Jersey Lawyer, 12/12/2022
- "Supportive Services for Aging Adults: A Program Comparison for Aging Adults with Intellectual and Developmental Disabilities," PLAN|NJ, Fall 2022
- Quoted in NextAvenue article "3 Estate Planning Mistakes to Avoid", 10/28/2021
- The Affordable Care Act and Its Impact on Individuals with Special Needs, December 2013

## Events

- Porzio's Women's Initiative Network's Ethics & Eggs Seminar 2021, 12/09/2021

## Speaking Engagements

- "Invisible Disabilities: Can You See What I See?," National Academy of Elder Law Attorneys (NAELA) Annual Conference, 5/04/2024
- "Wealth Building & Wealth Protection," Power Rising 2024, 2/10/2024
- "Practical Approaches to Guardianship Issues," Porzio Webinar in Partnership with the JCC of Central New Jersey, 11/29/2023
- "24th Annual Elder and Disability Law Symposium," NJICLE, 12/08/2022

## Crystal West Edwards Cont.

- "An Insider's Guide to Maximizing State Disability Benefits," 40th Annual Autism Conference, 10/21/2022
- "General Taxations of SNTs," Stetson's Annual National Conference on Special Needs Planning and Special Needs Trusts, 10/12/2022
- "Ethics and Professionalism in Today's Society: How to Discuss, Address and Promote Diversity, Equity and Inclusion in Your Trust and Estates Practice and with Your Clients," 56TH Annual Heckerling Institute on Estate Planning – Virtual Institute, 3/29/2022
- Co-Moderated the 23rd Annual Elder and Disability Law Symposium, New Jersey Institute of Continuing Legal Education (NJICLE), 12/17/2021
- "Do you see what I see? Invisible Disabilities," Porzio's Ethics & Eggs 2021, 12/09/2021
- "The Ins and Outs of Law Firms: Entering and Exiting a Law Firm Partnership," National Academy of Elder Law Attorneys Annual Meeting, 3/25/2021
- "Demystifying Estate Planning and the Probate Process," Delta Sigma Theta Sorority Inc., 1/16/2021
- "Charitable Planning and Board Governance," Infinity Financial Ministries, 1/16/2021
- Co-Moderated the 22nd Annual Elder and Disability Law Symposium, New Jersey Institute of Continuing Legal Education (NJICLE), 12/01/2020
- "LEAP Career Forum: Trust & Estates", Metropolitan Black Bar Association (NYC), 10/14/2020
- "Taxation of Grantor & Qualified Disability Trusts," Conference on Special Planning and Special Needs Trusts, Stetson Law, 10/13/2020
- "Issues at the Crossroads: Where Elder Law and Family Law Meet", New Jersey State Bar Association Annual Meeting, 5/13/2020
- "Estate Planning: Wills, Durable Power of Attorneys and Advanced Directives", Webinar, Essex County Surrogate's Court, 4/29/2020
- Co-Moderated the 21st Annual Elder and Disability Law Symposium, New Jersey Institute of Continuing Legal Education (NJICLE), 12/18/2019
- Co-Chaired the National Academy of Elder Law Attorneys' 2019 Summit, Washington, D.C., November 14, 2019, 11/14/2019
- Co-Moderated the 20th Annual Elder and Disability Law Symposium, New Jersey Institute of Continuing Legal Education (NJICLE), 10/22/2019
- Co-moderated the 19th Annual Elder and Disability Law Symposium, New Jersey Institute of Continuing Legal Education (NJICLE), 2017

## Crystal West Edwards Cont.

- Co-moderated the 18th Annual Elder and Disability Law Symposium, New Jersey Institute of Continuing Legal Education (NJICLE), 2016

### Practices

- Wealth Preservation

### Area of Focus

- Charitable Planning
- Elder Law
- Estate Planning
- Guardianship
- Privately-owned Business Planning
- Trusts and Estates Litigation

### Media Mentions

- "I don't want my wife to lose everything': I've been diagnosed with dementia — I suddenly could not spell or write legibly," *The Moneyist*, 2/27/2024
- "What Happens to Your Mortgage After You Die?," *Refi.com*, 1/03/2024
- "Conflicts that Arise after the Retention of a Client," *The American College of Trust and Estate Counsel (ACTEC) Trust and Estate Talk*, 11/28/2023
- "Special Needs Planning and Divorce: A Comparative Approach to Protecting Benefits," *New Jersey Law Journal*, 1/17/2023

### Bar Admissions

- New Jersey, 2008
- Pennsylvania, 2008

### Court Admissions

- United States District Court, District of New Jersey, 2008
- United States Court of Appeals for Veterans Claims, 2009

## Education

- *Penn State Dickinson Law*  
J.D., 2008
- *University of North Carolina, Charlotte*  
B.A. in Political Science and Criminal Justice, 2005  
cum laude