
Susan (Sue) H. Haberberger

OF COUNSEL

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✉ Sue.Haberberger@youngmoorelaw.com



Sue concentrates her practice in the areas of estate planning and administration and wealth transfer. She assists clients in the preparation, revision and updating of estate planning documents including wills, revocable living trusts, irrevocable life insurance trusts, powers of attorney (for both asset management and health care), and living wills. Sue also advises individuals on planning for and minimizing estate taxes, and counsels clients on the development of gifting strategies, including annual exclusion gifting and charitable gift planning. Sue also counsels clients on asset protection issues.

Sue has shown a dedicated commitment to building stronger communities through volunteer leadership and service to nonprofit organizations that benefit the greater Raleigh community. She has been elected into leadership roles in a number of significant nonprofits, and continues to be an ardent supporter of Raleigh's charitable network.

A native of Reading, Pennsylvania, Sue attended Wheaton College in Norton, Massachusetts and graduated from the William S. Richardson School of Law at the University of Hawaii where she was a member of the Law Review. She enjoys traveling and culinary adventures.

Representative Experience:

- Prepares tailored estate planning documents (from simple wills to sophisticated trusts) to accomplish the specific estate planning objectives of her clients.
- Works with individuals to make provision for the needs of children (minors, fiscally immature, and/or special needs), address issues specific to second marriages and blended families, plan for unique family dynamics, and formulate options for heirs challenged by substance abuse issues.
- Counsels clients on transfers to noncitizen spouses, generation-skipping transfers, and other sophisticated tax issues.
- Collaborates with clients and their other professional advisors to ensure that beneficiary designations for retirement accounts and life insurance policies properly coordinate with their estate plans.
- Represents individuals with the negotiation and preparation of premarital and post-marital agreements to protect

wealth.

- Counsels clients on gifting strategies, both charitable and non-charitable, and the creation of trusts and other vehicles to accomplish those strategies.
- Advises charitable organizations on matters related to planned giving, bylaws, conflict of interest policies, gift acceptance policies, and tax-exempt status.

Education & Bar Admissions

- J.D., The William S. Richardson School of Law, University of Hawaii, 1990
- B.A., Wheaton College, Norton, MA, 1985

Admitted in

- North Carolina, since 1992
- Hawaii, 1990-1997

Focus Areas

- Asset Protection
- Charitable Gift Planning & Tax-Exempt Organizations
- Special Needs Planning & Guardianship
- Trusts, Estates & Wealth Preservation
- Wills, Trusts & Tax Planning
- Administration of Trusts, Estates & Probate

Achievements

- Recipient: The Faye L. Miller Distinguished Service Award in recognition of outstanding service, dedication, investment of time and whole-hearted commitment to the Alice Aycock Poe Center for Health Education (2014)

Activities

- North Carolina Bar Association Estate Planning and Fiduciary Law Section (1992-1996, 2000-present)
- Meals on Wheels of Wake County: Board of Directors (2017-present)
- Wheaton College, Norton, Massachusetts: Alumnae/Alumni Regional Coordinator (1999-present) ; President's Commission (2011-2014)
- Wake County Medical Society Alliance: Member (2008-present) ; Board of Directors (2011-2013)

- Raleigh Professional Women's Forum: Member (2013-present)
- Make-A-Wish Foundation of Eastern North Carolina: Board of Directors (2012-2018); Board Secretary (2015-present); Development Committee (2011-2012, 2017-2018)
- North Carolina Museum of History Associates: Board of Directors (2016-2018)
- The Poe Center for Health Education: Board of Directors (2011-2014); Executive Committee (2013-2014); Chair of the Community Engagement and Fundraising Committee (2013-2014)
- Cary Academy: Co-Chair of Class of 2013 Endowment Campaign (2012-2013); PTAA Board of Directors (2007-2010)
- Girl Scouts North Carolina Coastal Pines: Board Development Committee (2011-2013)

Publications & Presentations

- Leaving a Positive Legacy, Presented on March 13, 2018
- Estate Planning: When an Heir has a Substance Abuse Issue, *Physician Family Magazine* (pages 20-21), Fall 2017
- Legal and Estate Planning Issues: Leaving A Positive Legacy, Presented on April 19, 2017
- Top 10 New Year's Estate Planning Resolutions, Presented on January 25, 2017
- *Estate Planning*, biweekly column published by the *Triangle Business Journal*, 1993-1996
- Reasonable Searches Absent Individualized Suspicion: Is There a Drug-Testing Exception to the Fourth Amendment Warrant Requirement After *Skinner v. Railway Labor Executives' Association*? 12 *University of Hawaii Law Review* 345 (1990)

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