



## Haley A. Monaghan-Punch

ASSOCIATE

63 Kercheval Ave., Suite 200  
Grosse Pointe Farms, MI 48236  
T: (313) 887-0207 | F: (248) 901-4040  
hmonaghan-punch@plunkettcooney.com

### Practice Areas

Estate Administration

Estate Planning

Probate Litigation

Trust & Estate Planning

### Education

- Cooley Law School, *magna cum laude*, J.D., 2019
  - Certificate of Merit Award-Civil Procedure II
  - Certificate of Merit Award-Business Organizations
  - Certificate of Merit Award-Estate Planning
- University of Michigan, B.A., 2015

### Admissions

Michigan, 2020

Haley A. Monaghan-Punch is a member of Plunkett Cooney's Trusts & Estates Practice Group who focuses her practice on probate administration, trust administration and sophisticated estate planning matters across Michigan.

Ms. Monaghan-Punch advises personal representatives, guardians and conservators through probate proceedings – from initial appointment through final distribution and discharge. Her experience includes estates holding diversified investment portfolios, multi-property real estate interests, retirement assets and closely held business interests.

With a background in elder law and estate administration, Ms. Monaghan-Punch provides her clients with a valuable perspective when creating comprehensive estate plans, including wills, trusts and advanced healthcare directives. She works with them to implement tailored strategies designed to promote tax efficiency, preserve wealth, protect vulnerable beneficiaries and facilitate smooth intergenerational transfers.

Ms. Monaghan-Punch's dedication to her clients and the community underscores her belief in the importance of integrity, service and personalized legal solutions. Recognized for her attention to detail and pragmatic counsel, Ms. Monaghan-Punch partners closely with fiduciaries and advisors to streamline administration, mitigate risk and safeguard estate assets. She is committed to delivering responsive, solutions-oriented representation during pivotal life transitions.

A 2015 graduate of the University of Michigan, Ms. Monaghan-Punch continued her studies at Western Michigan University Cooley Law School from which she graduated in 2019. While in law school, she

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participated in the university's Elder Law Clinic and gained extensive experience with guardianship, conservatorship and probate proceedings.

### **Representative Client Work**

- Managed probate and trust administration for estates ranging from small estates to multi-million-dollar estates, ensuring efficient asset transfer and statutory compliance
- Facilitated ancillary probate proceedings for out-of-state property, coordinating with local counsel and ensuring seamless multi-jurisdictional administration
- Successfully defended estate against creditor claims exceeding \$30,000 and preservation of estate assets for beneficiaries
- Secured court approval in matters involving multiple trust vacancies and fiduciary succession disputes
- Collaborated with financial advisors, CPAs, valuation experts, and title professionals to deliver coordinated, comprehensive estate and trust planning solutions
- Structured estate plan and coordinated administration strategy that enables surviving spouse and minor children to maintain residence in the family home and preserve financial stability
- Prepared stand-alone guardianship documents and delegation of parental authority forms for parents of minor children to address incapacity and emergency planning needs
- Counsel clients on wealth transfer strategies, probate avoidance and asset protection planning

### **Professional Affiliations**

- State Bar of Michigan