



UNITED STATES VIRGIN ISLANDS  
Economic Development  
Authority



U S V I E C O N O M I C D E V E L O P M E N T  
A U T H O R I T Y

# Estate Planning Conference

2025



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# FROM THE CEO

On behalf of the Virgin Islands Economic Development Authority (VIDEA), it is my honor to welcome you to this year's Estate Planning Conference. This gathering represents an important opportunity for us as a community to learn, plan, and take action to protect the legacies we have worked so hard to build.

I encourage each of you to listen closely to the presenting attorneys, whose expertise and guidance will provide you with the knowledge and tools needed to make informed decisions. Estate planning is not just about documents—it is about ensuring that your family, your businesses, and your community are prepared for the future. I urge you to take the insights you gain over this evening and put them into practice in the weeks ahead.

We are deeply grateful to the U.S. Department of the Interior for the grant funding that has made this conference possible. I also want to extend my sincere thanks to the dedicated staff of our Enterprise Zone Commission, whose hard work and commitment have brought this program to life. Most importantly, I wish to thank the people of the Virgin Islands. Over the years, you have shown up, learned, and taken action. Your participation is what gives this conference meaning and purpose.

Thank you for joining us and for continuing to invest in your future and the future of our community. Together, we are building stronger families and a stronger Virgin Islands.

Respectfully,

Wayne L. Biggs, Jr.

Chief Executive Officer

Virgin Islands Economic Development Authority



# AGENDA

**5:30 General Session**  
*The Pilot*

**6:15 Break**

*Information tables & Refreshments*  
Tables include AARP of the Virgin Islands, Banco Popular, Freedom Financial Advisors, the Office of the Lt. Governor of the Virgin Islands, and the Virgin Islands Economic Development Authority.

**6:30 Breakout Sessions**  
*A. Probate*  
*B. Estate Planning*

**7:30 General Session**  
*Next Steps & Into the Future*

**7:50 Close**

# PRESENTERS



## Renee M. Andre, Esq.

Renée André is a Partner with the Law Office of Marjorie Rawls Roberts, PC, representing clients before the Economic Development Commission, as well as representing clients in the areas of family law, probate, trust and estates, real estate and corporate transactions.

**340-776-7235**

**[renee@mrrvilaw.com](mailto:renee@mrrvilaw.com)**



## Rosalie Ballentine, Esq.

Rosalie Simmonds Ballentine is a distinguished attorney based in the U.S. Virgin Islands and principal of the Law Offices of Rosalie Ballentine. She brings decades of experience in litigation, real estate law, estate planning, alternative dispute resolution, and mediation.

**340-774-3378**

**[roselaw@viaccess.net](mailto:roselaw@viaccess.net)**



## David Bornn, Esq.

David A. Bornn has dedicated his legal career to serving the people and institutions of the U.S. Virgin Islands. Currently the Senior Business Advisor at Majorie Roberts, PC, Bornn focuses on corporate and commercial transactions, business formations and advisory services and estate planning, including wills and trusts.

**340-776-7235**

**[david@mrrvilaw.com](mailto:david@mrrvilaw.com)**



## Scott McChain, Esq.

Scot McChain, Esq. is the Managing Partner at McChain Hamm & Associates, LLP also known as USVI LAW, LLC. He is an experienced Virgin Islands Attorney with over 23 years of experience practicing law in the Territory with focus areas in Business Law, Litigation, Economic Development, Insurance, Real Estate, and Estate Planning.

**340-719-0601**

**[smcchain@usvi.law](mailto:smcchain@usvi.law)**



## K. Molyneux-Molloy, Esq.

Karabo Molyneaux-Molloy, Esq. is a dedicated estate planning and probate attorney licensed in the U.S. Virgin Islands, bringing nearly a decade of comprehensive legal expertise to her practice. She specializes in serving clients with Virgin Islands assets, providing seamless legal guidance whether they call the islands home or reside elsewhere.

**340-344-0152**

**[karabo@usviestateplan.com](mailto:karabo@usviestateplan.com)**



# THE GRANT

The U.S. Virgin Islands Economic Development Authority (USVIEDA), with the recommendation of the Governor of the Virgin Islands, secured grant funding from **the U.S. Department of the Interior's Office of Insular and International Affairs (DOI/OIA)** Technical Assistance Program (TAP) in 2020. The purpose of this funding was to establish a resilience program aimed at addressing the pervasive issue of abandoned buildings by tackling the complex, multi-generational challenges of property ownership. The

- Through the **Estate Planning Conferences**, the program reached more than 5,000 individuals via in-person attendance, radio, television, Zoom, and Facebook.
- Based on the videos taken at previous estate planning conferences, an **Estate Planning Web Page** on the VIEDA website has been created to further provide information to the Virgin Islands community. You can simply enter any probate/estate planning question and if the question was covered at the conference, the response (information, not legal advice) will be provided.
- Additionally, eight individuals participated in a **pilot probate/ estate planning program**, experiencing varying degrees of success. Four attorneys (Ballentine, Gray, Molloy and Paiewonsky) took on the charge to resolve their probate/estate planning issues presented. Their challenges, strategies, and solutions will be shared at [www.usvieda.org](http://www.usvieda.org) to guide future efforts.

Following are the cases as originally presented for the pilot program:



# THE PILOT

## Cases as originally presented

**Family 1:** Siblings all in their 80s with one sibling that had already passed. The family were potential heirs to a property in the Enterprise Zone. With a potential for 8 to 12 potential heirs in the next generation, the siblings needed to create an estate plan that would provide how the property was handled.

**Family 2:** Potential heirs that are grandchildren of the named owner of a property in the Enterprise Zone. The property is currently occupied by someone who is not a potential heir and no longer paying rent. The family needed to confirm all of the heirs and form an entity which will manage the property.

**Family 3:** Siblings that do not share both parents are potential heirs to a property within the Enterprise Zone. Locating and confirming all potential heirs of the property and determining the appropriate shares for each, then creating a solution for future ownership.

**Family 4:** Two daughters of a deceased part owner of multiple properties in the Enterprise Zone are potential heirs. What is needed is to identify any other potential heirs and consolidate the holdings/create and estate plan for future distribution.

**Family 5:** A family of 8 siblings with three remaining sibling alive were heirs to a property. All of the siblings had previously agreed, though not with legal documents, to give the house in the Enterprise Zone to the youngest sibling. The children of the deceased siblings were aware of their parents wishes. What was needed is to document the wishes of the sibling to give clear ownership and create an estate plan for the future disposition of the property.

**Family 6:** A large family of 30 individuals are potential heirs to a property in the Enterprise Zone. Some of the potential heirs have indicated they are not interested in the owning the property and have given their shares to others. What is needed is a recalculation of shares of ownership and the creation of an entity to manage the property and indicate future estate distribution.

**Family 7:** The family owns several properties with owners and from different generations. Determination of potential percentage of owner and reducing to an entity ownership is the solution being considered.

**Family 8:** Three owners of which one has paid the property tax for 20 years. The other two have lived off island for as many years and expressed some interest in continuing to own but not necessarily deal with the liability.



# TAKING ACTION

## PROBATE

Deed  
holder

Name(s):

B

D

Name:

B

D

Name:

B

D

Name:

B

D

1. **Build a family tree.** If the deed holder does not have children, make sure to provide information about their siblings.
2. **Gather all of the documents possible** to include the deed, any wills or trusts of deceased individuals in the tree and death certificates. Talk with elders to get additional information about family members who may have moved away.
3. **Contact a legal counsel** that is familiar with probate.



# TAKING ACTION

## ESTATE PLANNING

LIST ALL OF YOUR ASSETS	LIST WHO YOU WANT TO GIVE IT TO

1. **List all your assets** and who you would like to give it to & **identify two individuals** who can carry out your wishes.
2. **Gather your documents:** Your deeds, insurance policies, bank account information, etc.
3. **Call a legal counsel** who specializes in estate planning.

# THE WEBSITE

# www.usvieda.org

About ▾ Invest in the USVI ▾ Grow & Expand ▾



Key Industries ▾

Vision 2040 ▾

More ≡



## Estate Planning

### Protecting Your Legacy: Estate Planning in USVI

Estate planning in the US Virgin Islands ensures assets are distributed according to one's wishes and provides for care in case of incapacity. It is especially important due to widespread issues with distressed, multi-generational properties that complicate repairs and loans.



USVIEDA Estate Planning: Trusts, Wills, and Asset Protection



Hi! What can I help you with?

What makes a trust confidential?

Why do properties become distressed?

How can I protect myself?

Why do wills need probate?

Powered by Chatbase

What is estate planning?



I have a probate problem. What should I do?



# NOTES



# THANK YOU

**To the U.S. Department of Interior, Office of Insular Affairs** for providing a grant that funded the Estate Planning Conferences, created the pilot program and built a landing page to assist the community to resolve estate planning issues.

**To the attorneys** who have volunteered over the years to present at the Estate Planning Conference to include:

Renee Andre  
David Bornn  
Samuel Grey  
Anthony Kiture  
Karabo M. Molloy  
Hon. Carolyn H. Percell

Rosalie Ballentine  
Richard Bourne-Vanneck  
Hon. Emile Henderson  
Scott McChain  
Anna Paiewonsky  
Hon. Yvette Ross

**To the Virgin Islands community** and those that took part in the pilot for taking the necessary steps to resolve their challenges and build wealth for their descendants. Thank you.

## VI ECONOMIC DEVELOPMENT AUTHORITY

## ENTERPRISE ZONE COMMISSION

 [www.usvieda.org](http://www.usvieda.org)

 [ezc@usvieda.org](mailto:ezc@usvieda.org)

 340-773-6499

 340-714-1700