

Dana B. Perry

Shareholder



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After carefully considering a client's wishes and family dynamics, we develop an individualized plan that covers all the bases – from leaving a legacy to wealth preservation to elder planning and care coordination. We reduce stress and provide solutions that work now and into the future.

With more than 30 years' experience helping individuals and families secure their futures and protect their assets, Dana Perry handles estate planning, elder law, and special needs planning with the level of detail and compassion clients deserve. Her hands-on approach ensures that clients understand all of their options for multi-generational estate and tax planning, long-term care, benefits including Medicaid and Medicare, various trusts, and beyond. She and her team take a holistic approach and are extremely responsive. They assist with everything from simple wills and incapacity documents to intricate supplemental needs trusts and care coordination. Through her comprehensive needs analysis, Dana works with clients to craft a strategic and realistic plan that will minimize future costs and maximize each family's protection. Dana is highly regarded in the region for her experience in preparing and implementing complex estate plans and wealth transfer strategies for high net-worth clients. She has worked with many family business owners on protecting their interests, planning for potential incapacity, and transitioning matters to the next generation – or else preparing for sale. Her team's goal is for client legacies to last, meaning assets are conserved and managed for children and others for years to come. Understanding the numerous benefits reaped from effective estate planning and the crippling impact in the absence of it, Dana approaches her clients' legacy goals and concerns with a sincere commitment to them and their successes. Inspired by childhood elder mentors and the journey of a close family member with mental illness, Dana has stood in the shoes of her elder law and special needs planning clients. She leads an interdisciplinary team, has been licensed as an Elder Law Specialist since 1997, and is one of only a handful of Certified Elder Law Attorneys in the region qualified by the National Elder Law Foundation to serve elders and their families. She is also accredited by the Department of Veterans Affairs and a member of both the Academy of Special Needs Planners and the National Academy of Elder Law Attorneys. Dana is well-versed in the issues and regulations that matter most to seniors and families of loved ones with special needs.

Services

- Asset Protection Planning
- Charitable and Foundation Planning
- Elder Law, Long-Term Care and Medicaid Planning, and Care Coordination
- Estate Planning
- Estate and Trust Litigation
- Family Business Planning and Succession
- Pre and Postnuptial Agreements
- Probate – Estate and Trust Administration
- Special Needs Planning
- Tax

Industries

- Individuals, Families, Estates, and Trusts
- Long-term, Home, and Community-based Health Care

Admissions

- Georgia
- Tennessee

Education

Experience

Estate Planning

Represents a diverse client base in the preparation and implementation of complex estate plans and wealth transfer strategies ranging from simple wills and incapacity documents to intricate trust planning and multi-generational tax planning.

Dana's Services Include:

- **Basic estate planning**, including: Last wills, revocable trust agreements, powers of attorney, and advance directives
- **Complex trust planning**, including: Irrevocable Life Insurance Trusts, Spousal Lifetime Access Trusts, Qualified Personal Residence Trusts, and Tennessee Investment Services Trusts
- **Family business succession planning**
- **Plan implementation** through assistance with beneficiary changes and asset retitling
- **Close coordination with clients' existing tax and investment advisors** to develop a coordinated approach

Elder Law

Serves elders and their families as a counselor and advocate, developing a comprehensive, customized plan to anticipate and meet the full spectrum of a client's financial, legal, and personal care needs.

Dana's Services Include:

- **Trust planning**, including: Supplemental Needs Trusts and Qualified Income or Miller Trusts
- **Disability and incapacity planning**, including: Advance directives, guardianships, conservatorships, health care proxies, and living wills and trusts
- **Benefits planning**, including: Medicare, Medicaid, Social Security, Social Security Disability, and veterans' benefits
- **Insurance**
- **Crisis planning**
- **Home visits**

Special Needs

Assists families with loved ones with special needs in creating and implementing a holistic plan which addresses the whole of a dependent's needs, including government benefits eligibility, wealth preservation, and guardianships and conservatorships.

Dana's Services Include:

- **Trust planning**, including: First-Party Special Needs Trust or d4a trust, Third-Party Special Needs Trust, and Supplemental Needs Trust
- **Disability and incapacity planning**, including: Guardianships, conservatorships, powers of attorney, and living wills and trusts

- J.D., Vanderbilt University Law School, 1988
- B.A., University of the South, cum laude, 1985

- **Benefits planning**, including: Medicaid, Medicare, and Supplemental Security Income
- **Comprehensive care planning** that addresses care needs such as transportation, housing, home care, and employment and volunteer opportunities
- **Insurance**
- **Specialized estate planning**
- **Home visits**

Associations

Professional

- Meritas, Executive Committee, Vice-Chair and Chair of Finance Committee (2018-2020); U.S. Leadership Committee, Member; Trust and Estate Section Steering Committee, Member; past Board member (2014-2017)
- Chambliss, Bahner & Stophel, Managing Shareholder, 2009-2014
- Academy of Special Needs Planners
- National Academy of Elder Law Attorneys
- Chattanooga Tax Practitioners
- Certified Elder Law Attorney by the National Elder Law Foundation
- Accredited Attorney, Department of Veterans Affairs

Bar Associations

- American, Chattanooga, and Tennessee Bar Foundations, Fellow
- Tennessee Bar Association, Elder Law Section, Past Chair
- Chattanooga Bar Association
- Lookout Mountain Bar Association
- State Bar of Georgia
- American Bar Association

Noteworthy

- *Mid-South Super Lawyers*, Top 100: 2024 Tennessee Super Lawyers
- *Best Lawyers in America* "Chattanooga Trusts and Estates Lawyer of the Year," 2014, 2018, 2020
- *Best Lawyers in America*, Elder Law and Trusts and Estates
- *Mid-South Super Lawyers*, Estate and Probate; Elder Law, 2006, 2009-2024
- *Mid-South Super Lawyers*, Top 50 Women Mid-South Super Lawyers, 2011, 2012, 2013
- Woman of Distinction, American Lung Association, 2015
- Martindale-Hubbell® AV® Preeminent™ Peer Review Rated
- Avvo 10.0 Rating
- JD Supra Readers' Choice Awards, Estate Planning Top Author, 2016
- UnBought and UnBossed Awards Honoree, Girls Inc. of Chattanooga, 2011
- Phi Beta Kappa

Community

- Hunter Museum of American Art, Board of Directors
- Lyndhurst Foundation, Board of Trustees
- Chattanooga State Foundation, Board of Directors

Sidebar

Dana's passion for empowering others can be seen both inside and out of the office. She does all she can to give back to the community and help shape a more just and inclusive society. While serving on numerous nonprofit and foundation boards, she has helped equip individuals across the community, especially in the downtown area where she lives. Some of Dana's hobbies include running 5K and 10K races, attending events related to art and music, traveling, and spending time with her family. She is a member of Thankful Memorial Episcopal Church.