# Estate Planning

**Section Chair**
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## The Chambliss estate planning team has grown to be one of the top regional resources in family wealth preservation and aging. We care about our clients and will provide strategic plans to protect their future and the legacies they intend to leave.

Our estate planning team takes a personal approach to advising our clients and their loved ones. We will provide tailored solutions every time because we have the experience, training, diverse skill set, and network to uncover all available options. From planning for generations to come to addressing a family emergency, we are with our clients throughout it all. We offer holistic estate planning services, including elder law, long-term care and Medicaid planning, care coordination, special needs planning, estate and trust administration, and family business planning. As our clients’ needs have evolved over the years, so has our team. Not only do we have excellent attorneys, but we also have resident CPAs, Tennessee licensed Social Workers, and two of only a handful of Certified Elder Law Attorneys in the Southeast. We also have built a strong network of resources for our clients, including those in financial planning and wealth management, long-term care and senior housing, home health and hospice, Social Security and the Veterans Affairs Office, and beyond. In addition, we strive to work seamlessly with our clients’ existing advisors and other members of their circle of support.

Our capabilities are distinctive among law firms and clients can be confident in our ability to address any concern, challenge, or life wish. While we tell our clients that planning ahead is essential, we realize that the unexpected does happen. It’s our job to quickly find all options available to our clients and draft plans that can withstand the test of time (and life’s surprises).

### Related Services

- Charitable and Foundation Planning
- Conservatorships and Guardianships
- Elder Law, Long-Term Care and Medicaid Planning, and Care Coordination
- Estate and Trust Litigation
- Pre and Postnuptial Agreements
- Special Needs Planning
- Tax

### Related Industries

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

### Related People

- Nicholas E. “Nick” Nester
- Shelton Swafford Chambers, CPA
- Rebecca H. Miller
- Michelle L. Austin
- Sally L. Brewer
- Katherine H. Farmer
- J. Nelson Irvine

We understand the obstacles and complexities with compassion and expertise by drawing from our first-hand experience and years of studying the issues that matter most. We understand the obstacles clients often face in designing their estate plan and the sensitive issues that accompany this process. We want to know our clients' dreams, goals, and challenges from the start so we can best serve them and their visions for the future. After conducting a full analysis – which may cover finances, life insurance, health care benefits, and care needs depending on the situation – we formulate an action plan. Clients turn to us for a variety of needs, such as drafting or revising wills, powers of attorney, and trust documents. We also assist with pre and postnuptial agreements, succession planning, Medicare, VA benefits, conservatorships, probate, and tax planning. Our main objective is to examine each individual's options and help the client choose the route that will minimize future expenses and maximize protection of assets for our clients' and their loved ones.

## What We See on the Horizon

Contact our Chambliss team for our latest insights about the following:

- **According to U.S. Census data, "for the first time in United States history, there are more people over 65 years than under 18…"** We have witnessed the opportunities and challenges facing baby boomers today and how those have changed how service providers, like us, respond and offer solutions. This is why we adapted our capabilities to include areas like care coordination, long-term care planning, and special needs planning. We also created an annual forum, Embrace Aging, to address emerging issues and connect our clients and community to numerous resources in aging.

- **Estate planning is no longer synonymous with "the elderly."** While many of our clients are older Americans, we also work with adult children of aging parents who may be in their 30s and 40s. Not only do we help them serve their aging loved ones, but we also help them proactively plan for their futures, too. We address issues like protecting digital assets, creating trusts, and determining what their own best quality of life looks like.

- **Changes in tax law are altering the approach to savings and retirement.** Anyone with a retirement account should consider the effects of the SECURE Act, which drastically changes the treatment and strategies for withdrawing retirement plan benefits in a tax effective manner after both spouses are deceased.

- **Special needs planning is critical for loved ones who care for individuals with a disability.** We consider our clients' full financial and personal picture when putting together an estate plan. We want to ensure our clients' loved ones receive the benefits and quality of life our clients meant for them to have.

- **Some of our clients have a non-traditional family structure.** We bring creative thinking to planning for them in a thoughtful and sensitive manner.

## A Snapshot of Our Depth

- Simple wills to complex estate plans

- Pre and post nuptial agreements

- Wills with trusts for children

- Dana B. Perry
- Jannine M. Rowell
- Mae Shelley
- Ashli E. Smith
- Gregory D. "Greg" Willett
- W. King Copler
- Amy B. Boulware
- David B. Roberts
- Abigail Jansen Sutton
- William "Dub" Ellis
- Lydia M. Boydston
- Colin A. Wolfe
- Chasity F. Jackson

- Wills designed to utilize Federal Estate and Generation Skipping Transfer Tax Exemptions
- Revocable trusts – including tenancy by the entirety trusts and community property trusts
- Irrevocable trusts – including intentionally defective grantor trusts, insurance trusts, dynasty and multigenerational trusts, and special-needs trusts
- Charitable lead and reminder trusts
- Powers of attorney and advanced care plans
- Care coordination
- Medicare, VA, and other government benefits planning
- Conservatorships and guardianships
- Family contributions and business succession plans
- Estate and trust administration including all types of probate
- Estate and trust litigation
- Special needs planning including trusts, SSI, SSDI, and long-term care