

Tax



Section Chair

Gregory "Greg" D. Willett

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Individuals, their businesses, and families have access to our attorneys, CPAs, and network of resources to address all of their tax planning needs, which is extremely beneficial to high net worth families.

Clients ranging from individuals to tax-exempt organizations to public companies rely on our tax team for federal and state tax matters, choice of business structure, mergers and acquisitions, state tax planning, representation before the IRS, and other taxing authorities. For many years, we have been at the forefront of assisting clients with sophisticated tax planning in the U.S. and internationally. Our tax team, including attorneys and CPAs, consistently works to address our clients' most complex tax issues by proactively addressing their concerns and future needs. Utilizing our combined 30+ years of experience in tax law and accounting, we dig deep to find tailored solutions for each client's unique situation.

Having worked with many clients for decades, we understand the value of long-standing relationships and are committed to our clients' long-term goals. It's important for us to proactively plan and work with our clients' other advisors. Our work today is meant to benefit our clients now, as well as future generations to come, especially

Related Services

- Audit Counsel: PPP Loans and Other Investigations
- Business Organizations and Planning
- Capital Equipment and Materials
- Commercial Contracts
- Corporate Governance and Risk Management
- Estate Planning
- Financial Services
- Trade Regulation and Product Distribution

Related Industries

- Charitable and Public Purpose Organizations
- Education
- Individuals, Families, Estates, and Trusts
- Manufacturing
- Transportation and Logistics

Related People

- Shelton Swafford Chambers, CPA
- Nicholas "Nick" E. Nester
- Michelle L. Austin
- Dana B. Perry

when working with high net worth families. A Snapshot of Our Depth

- Estate and gift tax return preparation for individuals and estates
- Assisting individual executors and trustees in administration of estates and trusts
- Assisting businesses, individuals, and CPA firms on complex tax matters
- Corporate, foundation, and individual tax planning
- Family business planning and succession
- Charitable gift planning
- Federal and state tax planning for individuals and entities
- Like-kind exchanges
- Private letter rulings by the Internal Revenue Service
- Representation before the courts and taxing authorities
- Employee benefits and retirement planning
- Sales and use tax
- Structuring mergers and acquisitions
- Tax-exempt entities formation and operation

Experience

Advised venture capital fund as to most efficient tax structure

Advised multi-national company as to most efficient tax structure of European acquisition

Provided business and tax planning services relating to medical practice mergers

Represented tax-exempt educational institution in regard to an IRS challenge to its exempt status

Represented public company in corporate restructuring

Represented individuals and businesses in state and federal tax audits

Provide routine counsel to a number of foundations, churches, charitable trusts, and other tax-exempt entities

Assist high net worth families with tax and estate planning

- Mae Shelley
- Ashli E. Smith
- Gregory "Greg" D. Willett
- W. King Copler
- Lisa M. Kiner