

## Estate Planning

### **ATTORNEYS**

Eric R. Fox  
Victor S. Chang  
Matie B. Little  
John Lovelace  
Douglas M. Andre  
Michael Kaercher  
Kasey A. Place  
Steven C. Caywood  
Benjamin L. Grosz  
Lisa Milot

Our estate planning attorneys represent a variety of high net worth individuals and multi-generational families, from those with significant inherited wealth invested in diversified assets to those with major equity holdings in closely held businesses created by them or their families. This practice group serves clients in the following areas:

- Wealth Planning
- Family-Owned Businesses
- Exempt Organizations and Charitable Giving

We are proud of the strong relationships that our firm has built with our estate planning clients. Many of the families served by our estate planning group have been clients of the firm since its founding in 1935. We have had considerable experience in addressing a broad range of problems and in developing comprehensive individual and family estate plans that take into consideration the unique relationship and goals of each client. This experience transcends tax issues and can only be gained by decades of practice.

### **NEWS**

- December 15, 2011  
Ivins Attorneys Speak at DC Bar on Estate Planning with Retirement Plan Assets
- August 31, 2011  
Ten Ivins Attorneys Named to 2012 Best Lawyers in America
- May 6, 2011  
Ivins Attorneys Speak at 2011 ABA Tax Section May Meeting
- December 23, 2010  
CNBC Business News, "The Call"

| 2 | Estate Planning

- October 28, 2010  
H. Stewart Dunn Named Washington DC Tax Lawyer of the Year

**STRATEGIES & OPPORTUNITIES**

- IRS Announces Offshore Voluntary Disclosure Initiative
- Federal Estate Tax Repeal Creates Uncertainty for Estate Plans in 2010
- Roth IRA Conversions Present Significant Planning Opportunities in 2010 and Beyond

**PUBLICATIONS**

- January 30, 2012  
Expedited Opt-Out Needed for OVDI Participants Who Owe No Tax  
*Tax Notes*
- January/February 2010  
Charitable Lead Trusts -- A Win-Win Strategy for Donors and Charities  
*Taxation of Exempts*
- May 18, 2011  
Carter Hood Comments on New Law Governing Foreign Trusts with U.S. Beneficiaries
- November 11, 2010  
Deductibility of Charitable Contributions  
*35 Estates, Gifts and Trusts Journal 274*
- September 27, 2010  
Gaps in the Seventh Circuit's Reasoning in Lantz  
*Tax Notes*