



Holly B. Norvell

ASSOCIATE

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### Practice Areas

- Estate Planning and Administration
- Taxation
- Charitable Planning
- Business Succession Planning

### Representative Work

- Advise high net worth clients on sophisticated estate planning techniques to preserve and steward family wealth for multiple generations using wills, revocable trusts, irrevocable trusts, marital property agreements, limited liability companies, partnerships, and charitable gifting techniques
- Counsel clients on federal and state income, estate, gift and generation-skipping tax benefits and risks of proposed transactions
- Work with NC and TX real estate investors and developers to increase after-tax profits of real estate activities by maximizing income subject to capital gains tax rates and minimizing income subject to ordinary income tax rates in limited liability companies, partnerships and corporations
- Assist business owners with business succession opportunities by drafting and interpreting shareholder agreements, operating agreements, buy-sell agreements, employment agreements, and salary continuation agreements
- Assist in forming private foundation charitable trust and obtaining determination letter
- Experience with judicial and nonjudicial reformations of trusts
- Probate and administer estates, fund testamentary trusts, file federal and state estate tax returns, and implement post-mortem planning
- Represent parties in contested estate cases

### Education

- University of Texas (Bachelor of Business Administration, High Honors, 1996)
- University of Texas (Master in Professional Accounting, Specialization: Taxation, May 1996)
- University of Texas School of Law (Juris Doctor, Honors, May 2002)

### Honors and Awards

- Intern, Justice James A. Baker, Supreme Court of Texas
- Associate editor, Texas Review of Law and Politics

### Professional Designations

- Admitted to Texas State Bar (November 2002)
- Admitted to North Carolina State Bar (September 2004)
- North Carolina Board Certified Specialist, Estate Planning and Probate Law, North Carolina State Board of Legal Specialization (2007)
- Certified Public Accountant, Texas (1997)

### Professional Organization

- American Bar Association (Tax and Real Property, Trust, and Estate Law sections)
- North Carolina Bar Association (Estate Planning and Fiduciary Law section)
- Mecklenburg County Bar Association (Estate Planning and Probate section)
- State Bar of Texas (Tax and Real Estate, Probate and Trust Law sections)
- Charlotte Estate Planning Council



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JOHNSTON  
ALLISON  
& HORD  
Attorneys

### Publications & Presentations

- Author, "Planned Giving Opportunities," Charlotte Region Leave A Legacy® newsletter, September 2011
- Co-Author, "Asset Protection Planning for Estate Planning," *The Will and the Way*, September 2011
- Co-editor, NCBA Estate Administration Manual, 7th edition
- "Ethics for Estate Planning Attorneys," speaker & coauthor, National Business Institute, Charlotte, North Carolina, November 27, 2007
- "Probate: Beyond the Basics," speaker & coauthor, National Business Institute, Charlotte, North Carolina, December 5, 2006
- Author, "Paw Law," Cats & Dogs of Charlotte, Fall 2006
- Author, "Providing for Our Pets," Cats and Dogs of Charlotte, Summer 2006
- Co-Author, "NC Tax Laws Have Seen Changes," Charlotte Observer, March 7, 2005

### Community Involvement

- Volunteer, Legal Services for the Elderly and Legal Services of Southern Piedmont
- Finance Committee, Junior League of Charlotte (2007-2008)
- Treasurer, Secretary, and Member of Board of Directors, Austin LifeCare, Austin, Texas (2002-2004)

### Personal

- Born in Pensacola, Florida in 1972