



N. Lucille Siler

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Practice Areas

- Trust and Estate Planning
- Estate Administration
- Business Law
- Business Succession Planning
- Employee Benefits

Representative Work

- Assist family business owners with creation and implementation of plans for transferring the business to children or key employees, including drafting wills, trusts, buy-sell agreements, and shareholder agreements.
- Planning to minimize the impact of estate, gift, generation-skipping, and income taxes for high net worth families, including preparation of wills and trusts, gift planning, tax planning for qualified retirement accounts, and the use of family limited partnerships and limited liability companies.
- Representation of executors and administrators regarding administration of estates, including probate of wills before the clerk of court, fulfilling administrative duties, preparation of federal and state estate tax returns, representation in audit matters before the Internal Revenue Service, and disposition of assets.
- Represented employers in design, creation, and amendment of employee benefit plans, and in negotiations with the IRS and Department of Labor with respect to errors in administration of 401(k) and other employee benefit plans.
- Assisted purchaser in multi-million dollar acquisition of manufacturing facilities in United States, Germany, Brazil and Mexico.

Education

- North Carolina School of Science and Mathematics (1987)
- Davidson College (B.S., 1991)
- University of North Carolina at Chapel Hill (J.D., 1997)
- Admitted to the North Carolina Bar in 1997

Professional Organizations

- Charlotte Estate Planning Council
- Mecklenburg County Bar
- North Carolina Bar Association
- American Bar Association

Publications

- Co-Author, "U.S. Supreme Court Case Supports Constitutionality of *Peperuties Repeal*", *The Will and The Way*, May 2011.

Community Involvement

- Foundation For The Carolinas Cabinet of Professional Advisors (2011-present)
- Dilworth Child Development Center, Board Member (2011-present)
- Hospice and Palliative Care Charlotte Region, Board Member (2008-2011)
- North Carolina State Bar Authorized Practice Committee, Advisory Member (2006-present)
- North Carolina State Bar Ethics Committee, Advisory Member (2005)
- Foundation For The Carolinas' Impact Fund Steering Committee (2003-2004)
- Member, Impact Fund, 2001
- Board Member, Mecklenburg County Bar Young Lawyers Division (2000-2003)

Personal

- Born in London, England in 1969