JOHNSTON ALLISON HORD

# TRUSTS & ESTATES

In collaboration with high net-worth individuals and owners of closely-held businesses, our highly regarded team of **trusts and estates attorneys** helps plot strategic courses that enhance wealth management, prevent problems, allow for contingencies, and bring resolution to contentious issues.

With many decades of experience guiding people through major life transitions, we always strive to reduce uncertainty and foster stability. We cultivate and maintain close relationships, which augments our ability to help individual and institutional clients with issues that often are quite personal in nature – and some of these associations span generations. We serve our clients by taking a fair and level-headed approach. Because families recognize our skills and experience, they trust us to shepherd their matters wisely in order to generate the most favorable solutions possible.

We provide comprehensive estate-related guidance to clients in the Carolinas and beyond, advising clients in matters ranging from basic **asset disposition planning** to highly sophisticated plans designed to minimize transfer tax burdens. We have experience with and, when appropriate, utilize all advanced planning techniques such as valuation discount planning, complex estate, gift, income, and generation-skipping transfer planning, and **charitable planning**. Finally, we prioritize keeping our clients informed and updated on state and federal developments that have an impact on their estate and **tax planning**.

If you have any questions for our Trusts & Estates Attorneys, **contact us here**.

*Please note that the above text does not constitute legal advice nor does it create an attorney-client relationship. Should you be in need of legal services*

**Related Practices**

- Asset Protection Planning
- Business Succession Planning
- Business Transactions
- Charitable Planning & Exempt Organizations
- Condemnation Rezoning & Land Use
- Construction
- Creditors' Rights
- Elder Law & Special Needs Planning
- Employment Practices & Benefits
- Environmental
- Estate Administration
- Fiduciary Litigation
- Litigation
- Mediation & Arbitration
- Mergers & Acquisitions
- Nonprofit Entities & Tax-Exempt Organizations
- Professional Services
- Real Estate Advisory Services
- Taxation
- Private EquityRelated Industries
- Automotive
- Sports & Entertainment

**Group Members**

S. Kyle Agee
David T. Lewis
Stacy M. Reid Monroe
Holly B. Norvell
Lauren S. Martin
J. Darrell Shealy
N. Lucille "Lucy" Siler
Nicki Applefield Engel
Thomas G. Gardner
Benjamin L. Hopkins
Adia S. Caviness

*regarding a particular matter, please reach out directly to one of our attorneys.* ***Click here for our full website disclaimer****.*

Representative Experience

- Advised five generations of one family on a range of personal and business-related topics, such as business succession, estate planning and administration, premarital agreements, asset protection, and expansion and ultimate sale of the business.
- Dispassionately quarterbacked a conflict between feuding siblings who inherited a business to present a united family front and achieve an optimal sales price for the business. Our team melded finesse with personal issues and technical legal actions to achieve calm and stability, which allowed us to resolve several intra-family conflicts, settle issues with key employees and negotiate and close a nine-figure deal.
- Counseled a closely held business, and four generations of owners, through various corporate and intra-family issues, including reorganizing business entities for tax and liability protection purposes, protecting cash flow for senior family members, leveraging tax-advantaged strategies to prevent a liquidity crisis upon the death of senior family members, structuring arrangements for family members who are active in the business and those who are inactive in the business, and assisting in the succession of control to younger generation family.