WINSTEAD

Christine Wakeman

Shareholder Chair, Private Wealth Industry Group

Practices: Wealth Preservation
Industries: Private Wealth

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Education

Southern Methodist University, Dedman School of Law
- J.D., 2010
- *cum laude*
- Executive Editor, *SMU Law Review* Association

University of Oklahoma
- B.A., Political Science, 2006
- *with special distinction*

Christine Wakeman is a member of Winstead's Wealth Preservation Practice Group. She is board certified in Estate Planning and Probate Law by the Texas Board of Legal Specialization. Christine has experience in a range of estate and business planning matters involving fiduciaries, trusts, taxation and high net worth individuals and their families.

Prior to practicing law, Christine was selected as a Cortez A.M. Ewing Public Service Fellow and served in the Washington, D.C. office of United States Senator Dr. Tom Coburn during her fellowship.

Representative Experience

- Design and prepare core estate planning documents, including wills, revocable trust agreements, and medical and financial powers of attorney
- Advise executors, trustees, and beneficiaries regarding the funding, administration, taxation, and distribution of estates and trusts Design, implement, and monitor transfer tax minimization strategies, including gifts to family trusts, installment sales to grantor trusts, grantor retained annuity trusts (GRATs), and irrevocable life insurance trusts (ILITs)
- Aid clients with shifting new investment opportunities, corporate stock, and other appreciating assets to their family members in a tax-efficient manner
- Assist families with the formation of limited partnerships and limited liability companies to own and manage family farms, ranchland, mineral interests, vacation residences, and other family assets
- Design and implement business succession plans for families and key employees
- Prepare, review, and negotiate premarital agreem and post-marital agreements
- Counsel clients relocating to Texas with regard to their estate planning and marital property matters
- Help clients protect their privacy through the anonymous acquisition of personal residences and other assets
- Assist clients making anonymous charitable donations and political contributions
- Structure charitable gifts in a tax-efficient manner, including the creation and qualification of charitable trusts and private foundations
- Prepare and review federal gift tax returns (IRS Forms 709) and federal estate tax returns (IRS Forms 706)
- Obtain private letter rulings from the IRS on estate, gift, and generation-skipping transfer (GST) tax matters
- Assist trustees with judicial and non-judicial modifications to irrevocable trusts through techniques such as trust decanting, trust combinations, and trust divisions
- Counsel corporate trustees, trust departments, and family offices regarding general administrative matters

Professional & Community Service

- American Bar Association, Real Property Probate and Trust Section, Tax Section
- Dallas Bar Association, Probate, Trusts and Estates Section
- Dallas Estate Planning Council
- State Bar of Texas (Intermediate Estate Planning & Probate Course Committee Member)
- Dallas Association of Young Lawyers
- Communities Foundation of Texas, Advisory Council
- Hope Supply, Professional Advisory Council

Awards & Recognition

- Steven G. Condos Award for Outstanding New Member, Texas Bar College, 2017
- Texas Rising Star, Thomson Reuters, 2012, 2018-2019
- Board Certified in Estate Planning and Probate Law, Texas Board of Legal Specialization
- Chartered Advisor in Philanthropy
- Best Lawyers in Dallas, *D Magazine*, 2016-2017

Admissions

- Texas, 2010