

Christine Wakeman

Shareholder

Practices: Wealth Preservation

Industries: Investment Management & Private Funds

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 agreements 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



Dallas Office

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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*

Professional & Community Service

- American College of Trust and Estate Counsel, Fellow
 - Estate & Gift Tax Committee Member
 - State Laws Committee Member
 - Family Law Task Force Member
- American Bar Association
 - Tax Section Member
 - Real Property, Trust, and Estate Law Section Member
- State Bar of Texas
 - Tax Section Member
 - Real Estate, Probate and Trust Law Section Member
- Texas Bar College Member
- State Bar of Texas Advanced Estate Planning & Probate Course
 - Course Director, 2024
- State Bar of Texas Estate Planning & Probate Drafting Course
 - Course Director, 2021
- State Bar of Texas Intermediate Estate Planning & Probate Course: Practical Applications
 - Course Director, 2018
 - Planning Committee Member, 2015-2018
- Dallas Bar Association, Probate, Trusts & Estates Section Member
 - Chair, 2024-2025
 - Vice Chair, 2023-2024
 - Treasurer/Secretary, 2022-2023
 - Program Chair, 2021-2022
 - Council Member, 2018-2019
- Dallas Association of Young Lawyers
 - Older, Wiser, Lawyers Committee Co-Chair, 2018-2019
- Dallas Estate Planning Council, Emerging Professionals Initiative
 - Chair, 2015-2016
 - Committee Member, 2015-2017
- Dallas Estate Planning Council, Board of Governors, 2014-2016
- Chartered Advisor in Philanthropy

Awards & Recognition

- Steven G. Condos Award for Outstanding New Member, Texas Bar College, 2017
- Texas Rising Star, Thomson Reuters, 2012, 2018-2024
- Board Certified in Estate Planning and Probate Law, Texas Board of Legal Specialization
- Best Lawyers in Dallas, *D Magazine*, 2016-2017, 2020-2023
- Best Lawyers in Dallas Under 40, *D Magazine*, 2018-2023
- *The Best Lawyers in America*, (BL Rankings, LLC), 2024-2025

Admissions

- Texas, 2010