Jeff Chadwick

Shareholder

Practices: Wealth Preservation

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Jeff Chadwick is a member of the Wealth Preservation Practice Group with offices in Houston and The Woodlands. Jeff focuses his practice on trust and estate planning for business owners, corporate executives, professional athletes, and other high net worth individuals and families. He strives to provide innovative and practical solutions to a wide range of legal matters, including wealth transfer planning, trust and estate administration, business formation and succession, asset protection, charitable giving, and premarital planning.

Jeff is Board Certified in Estate Planning and Probate Law by the Texas Board of Legal Specialization. He is a frequent speaker at estate planning seminars around the country and is an active member of many professional organizations. He also serves on the Texas Trust Code Committee, where he monitors trust issues in Texas and drafts legislation for inclusion in the Texas Trust Code.

Before settling in Texas, Jeff began his career in Richmond, Virginia. Jeff has maintained his Virginia law license and regularly counsels clients transitioning from Virginia to Texas, or vice versa, with regard to their estate planning matters.

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)
- Help entrepreneurs, energy executives, and other clients shift 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
- Counsel clients relocating to Texas with regard to their estate planning and marital property matters
- Help professional athletes, celebrities, politicians, and other public figures 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

Education

University of Richmond School of Law
- J.D., 2009
- *summa cum laude*
- Managing Editor, *University of Richmond Law Review*
- Clerk, Hon. Henry E. Hudson, U.S. District Court for the Eastern District of Virginia, 2008
- First Place, Walter Scott McNeill Legal Writing Competition, 2008
- CALI Excellence for the Future Awards, Estate Planning, Estate & Gift Taxation, Federal Income Taxation, Corporations, Constitutional Law, Law Skills I, Law Skills III, 2006-2009

Baylor University
- B.S., Education, 2005
- *magna cum laude*

- 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

- Vice Chair, American Bar Association, Estate & Gift Taxes Committee
- Texas Trust Code Committee, State Bar of Texas, Real Estate, Probate & Trust Law Section
- Houston Estate & Financial Forum
- Houston Estate Planners Association
- Houston Bar Association, Probate Trusts & Estates Section
- Attorneys in Tax & Probate
- The Woodlands Bar Association, Estate Planning & Probate Section
- Woodway Financial Advisors, Advisory Board, 2014
- Virginia State Bar

Awards & Recognition

- Board Certified in Estate Planning and Probate Law, Texas Board of Legal Specialization
- American Bar Assocation, Tax Section, Nolan Fellow, 2016
- Virginia Rising Star, Thomson Reuters, 2012

Admissions

- Virginia, 2009
- Texas, 2013