

**PRACTICE FOCUS**

- > Tax
 - > Mergers & Acquisitions
 - > Partnerships, LLCs and Joint Ventures
 - > Estate and Succession Planning
 - > General Corporate
 - > Corporate Succession Planning
 - > Private Equity
- 614.621.7757
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PRESENTATIONS AND LECTURES

- > *Demystifying the Complexity of Section 704(b) Allocations and the Passive Activity Loss Rules*, Ohio Society of CPAs, Columbus, Ohio, 2009
- > *Distributions, Allocations and Other Income Tax Considerations for Family Partnerships*, Worthington Estate Planning Council, Worthington, Ohio, 2009
- > *COD Income Rules: Increasingly Important in a Troubled Economy*, with Brian C. Close of Dinsmore & Shohle LLP, Columbus Bar Association, Business Tax Committee, Columbus, Ohio, 2009
- > *Drafting Distribution and Allocation Provisions*, Columbus Bar Association, Business Tax Committee, Columbus, Ohio, 2009
- > *Taxing Matters: Hot 2008 Tax Topics*, with Christopher E. Axene, Rea & Associates, Inc., and Necol Russell-Washington, Esq., Carlile Patchen & Murphy LLP, Columbus Bar Association, Business Tax Committee, Columbus, Ohio, 2008
- > *Navigating the Partnership Merger Rules*, Columbus Bar Association Business Tax Committee, Columbus, Ohio, 2007
- > *Income and Estate Tax Strategies as Part of Land Conservation*, Buckeye Hills Resource Conservation and Development Council, Marietta, Ohio, 2007
- > *Section 83 and Taxation of Compensatory Partnership Interests*, Columbus Bar Association Tax Committee, Columbus, Ohio, 2006
- > *Please Buy My Stock!...Using Section 338 to Make a Deal Work*, Columbus Bar Association Tax Committee, Columbus, Ohio, 2006
- > *Estate Planning*, Ohio Women & Money, Treasurer of State, Dayton, Ohio, 2006
- > *Primer on Family Limited Partnerships*, Columbus Probate Law Institute, Columbus, Ohio, 2006
- > *Tax Advantages of Conservation Easements*, Ohio Resource and Conservation Development, Marysville, Ohio and Chillicothe, Ohio, 2006
- > *Partnership Equity in Exchange for Services*, Columbus Bar Association Tax Committee, Columbus, Ohio, 2006
- > *Planned Giving in Estate Planning*, Urbana University and Champaign Bank, Urbana, Ohio, 2005
- > *Estate Planning*, Northwest United Methodist Church, Columbus, Ohio, 2005
- > *Family Limited Partnerships*, Columbus Estate Planning Counsel, Columbus, Ohio, 2005
- > *Planned Charitable Giving*, Franklin Park Conservatory, Columbus, Ohio, 2005

- > *Estate Planning Fundamentals in Uncertain Times*, Merrill Lynch/Goldman Sachs, Columbus, Ohio, 2005
- > *Potential Tax Advantages of Conservation Easements*, Ohio Resource and Conservation Development, Summer Meeting, Columbus, Ohio, 2005
- > *Ohio Estate Planning and Drafting Fundamentals*, National Business Institute, Columbus, Ohio, 2004
- > *Potential Tax Advantages of Conservation Easements*, Ohio Scioto CREP, Chillicothe, Ohio, 2004
- > *Like-Kind Exchanges*, Columbus Bar Association Business Tax Committee, Columbus, Ohio, 2004
- > *Trust and Asset Protection Alternatives in Ohio*, National Business Institute, Columbus, Ohio, 2004
- > *Estate Planning Fundamentals*, Jordan Baptist Church, Columbus, Ohio, 2002
- > *Estate Planning Fundamentals*, Alkire Road Church of Christ, Columbus, Ohio, 2002
- > *Fundamentals of Will Drafting, The Basics of Living Trusts and Estate Administration*, Estate Planning and Probate for the Paralegal/Legal Assistant in Ohio, National Business Institute, Columbus, Ohio, 2002
- > *Estate Planning: Impact of the Economic Growth and Tax Reconciliation Act of 2001*, Columbus Bar Association 2001 Columbus Tax Conference, Columbus, Ohio, 2001
- > *Estate Planning Fundamentals and The 2001 Tax Relief Act*, Morgan Stanley Dean Witter, Columbus, Ohio, 2001
- > *Drafting Limited Liability Company Operating Agreements*, The Commercial Document Series, Columbus, Ohio, 2001
- > *Preparing for Your Future: Estate Planning Fundamentals*, Morgan Stanley Dean Witter, Columbus, Ohio and Granville, Ohio, 2001
- > *Equity Compensation: Limited Liability Companies and Corporations*, Capital University Law School / Columbus Bar Association 2001 Tax Institute, Columbus, Ohio, 2001
- > *The Use of Family Limited Partnerships and Limited Liability Companies in Estate Planning: Taxation of Family Limited Partnerships and Limited Liability Companies*, National Business Institute, Columbus, Ohio, 2000
- > *Compensation of Partners and LLC Members*, Columbus Bar Association Business Tax Committee, Columbus, Ohio, 1999
- Numerous other lectures on various tax and business topics.

HONORS AND AWARDS

- > *The Best Lawyers in America* (Trusts and Estates), 2009-2012; (Tax Law), 2012
- > *Ohio Super Lawyers*, "Rising Star," 2005-2008
- > *Columbus CEO Magazine*, "Top Lawyers," 2009-2011
- > *Columbus Business First*, "The Best Lawyers in Central Ohio," 2008-2010
- > *Columbus Business First*, "Forty under 40," Class of 2009
- > *Martindale Hubbell*, AV rated
- > Dean's Certificate of Achievement, Federal Tax Policy, University of Miami School of Law
- > The Arthur E. Petersilge Award (Wills and Trusts), Case Western Reserve University School of Law
- > American Jurisprudence Award (Wills and Trusts), Case Western Reserve University School of Law
- > Who's Who: American Law Students

PROFESSIONAL ASSOCIATIONS

- > American Bar Association
- > Ohio State Bar Association
- > Columbus Bar Association,
 - Business Tax Committee, co-chair - 2007, 2008

COMMUNITY ACTIVITIES

- > Kiwanis Club of Columbus,
 - Trustee - 2010, 2011
 - Co-chair, Columbus Kiwanis College Fair – 2009, 2010
 - Distinguished Member - 2009, 2010
- > Arthritis Foundation Golf Classic Committee - 2003-2005