



Jeffery J. Morris

Partner

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t 704.335.9864



Jeffery Morris represents clients in matters involving trusts, estate planning, estate administration, and taxation, including achieving and maintaining tax-exempt status. He is a North Carolina State Bar board certified specialist in estate planning and probate law. He practices in the areas of federal and state income, estate, gift, and generation-skipping transfer taxes. His practice also includes providing guidance for specific issues related to partnerships, S corporations, and limited liability companies.

REPRESENTATIVE EXPERIENCE

- Designed and implemented strategies to maximize the transfer of assets for gift and estate tax planning purposes.
- Prepared trust and estate planning documents.
- Created family companies and assisted with structuring organizational and governing documents.
- Advised client of strategies for income tax planning involving real estate and business activities.
- Prepared and assisted with structuring conservation easement.
- Created tax-exempt entities and prepare documentation to achieve exempt status.
- Advised clients regarding issues in estate and fiduciary litigation.
- Guided families through the estate administration process.

SPEAKING ENGAGEMENTS

- "Capitalizing on Opportunity Zones," Parker Poe Tax Forum in Raleigh and Charlotte, March 2019
- "Essentials of Business Succession Planning," Monroe-Union County Economic Development, May 2017



CHARLOTTE OFFICE



PRACTICE AREAS

Tax
Trusts & Estates
Tax-Exempt Organizations
Opportunity Zones
Investment Funds



EDUCATION

University of Florida
LLM, 2010
University of South Carolina
JD, 2009
Winthrop University
BS, 2005



ADMISSIONS

North Carolina, 2009
South Carolina, 2010



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HONORS

- North Carolina State Bar Board Certified Specialist in Estate Planning and Probate Law
- *Business North Carolina* magazine's "Legal Elite," Young Guns, 2019
- Order of Wig and Robe, University of South Carolina School of Law

MEMBERSHIPS

- Mecklenburg County Bar, Chair of the Estate Planning & Probate Section, 2014-2015
- South Carolina Law Review, Technology Editor