Megan W. Dunham

Counsel
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Megan Dunham advises clients on estate, trust, and tax issues. She designs creative and flexible estate planning solutions to balance opposing estate tax and income tax issues, as a result allowing clients to minimize transfer tax exposure and maximize income tax benefits while achieving their personal and familial succession goals.

Megan has experience implementing sophisticated transfer structures while navigating asset-related matters, including complex S corporation and partnership tax issues, and advising clients regarding multifaceted trust and estate income taxation issues to assist in reducing their overall tax burden. She has also restored and reformed malfunctioning or inefficient trusts through decanting, judicial and non-judicial modification, and other creative solutions. In addition, she has designed and implemented complex philanthropic transfers, including creating and administering the tax-exempt organization selected as the recipient of her client's property.

Prior to joining Parker Poe, Megan was a senior estate planner at Robert W. Baird & Co., an international wealth management company. In addition to serving clients at Baird, she created and implemented an internal policy regarding the reporting of tax, estate, and trust matters. Megan has also advised a North Carolina legislative committee on updating the decanting statute and revising other parts of state law concerning complex trusts.

CHARLOTTE OFFICE

PRACTICE AREAS

Tax
Trusts & Estates

EDUCATION

New York University
LLM, 2012
University of South Carolina
JD, *cum laude*, 2011
University of North Carolina at Chapel Hill
BA, 2008

ADMISSIONS

North Carolina