

## Timothy O. Davis

**"Estate planning is an often complex and always very personal endeavor, one that demands experience and trust in equal measure. Over my 39 years in this field, I have accumulated the requisite experience, and every day I strive to be worthy of my clients' trust."**

Timothy O. Davis is a partner with the firm and chair of the estate planning practice group. His practice is focused on assisting both individual and business clients in the areas of:

- Estate planning
- Probate and trust law
- Business succession planning
- Asset protection strategies

Tim helps clients with estates of all sizes and complexities achieve their planning objectives. For the past thirty-five years, he has represented clients in Probate, Trust Administration and Conservatorship matters throughout the seven county metro area Probate Courts.

Clients are often confused by the complexity of the trusts and estates area of law. Drawing on decades of knowledge and experience, Tim helps clients navigate the legal issues by explaining:

- How the probate and trust law applies to client circumstances
- Use of estate, gift, and fiduciary tax exemptions to minimize or eliminate taxes
- How wealth can be transferred efficiently and to the best advantage of beneficiaries
- How to successfully transfer a family owned business from one generation to another
- How changes in estate and gift tax laws affect client estate plans
- The use of the Medical Assistance rules to benefit clients

Perhaps the best testimony to the quality of Tim's work is the large number of referrals he receives from clients. "I am proud of the longevity I have with my client relationships," adds Tim. "The fact that so many of my clients have stuck with me is a tremendous honor, and one I am able to repay in part by being there for them at every stage of the process from estate planning through estate administration, as well as in business succession and asset protection."