

Douglas A. Bozell



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PRACTICE AREAS

Business Succession Planning
Charitable Planning
Corporate/Business
Estate and Trust Administration
Estate and Trust Litigation
Estate Planning
Estates, Trusts and Wills
Family Business Representation
Federal Estate Gift and Generation-Skipping Tax Planning
Income Tax Matters for Individuals and Business Entities
Retirement Planning
Tax Law

CONCENTRATIONS

Estate Planning
Estate Administration
Corporate Transactions
Tax

BAR MEMBERSHIPS

Missouri, 1994
Illinois, 1997
Kentucky, 1998
Indiana, 2001

Doug concentrates his practice in estate planning, charitable planning, taxation and general business law. He prepares wills and trusts, supervises the administration of estates and trusts, represents various parties in guardianships and contested will or trust litigation, and provides gift tax and estate planning advice to professionals and business owners in the larger context of business succession planning. Doug regularly lectures to attorneys and other estate planning professionals on a variety of estate planning and tax topics. He is a Fellow of the American College of Trust and Estate Counsel and is licensed to practice law in Kentucky, Indiana, Illinois and Missouri.

Highlights & Recognitions

Peer Review Rated, *Martindale-Hubbell*®

The Best Lawyers in America®, Louisville Trusts and Estates "Lawyer of the Year," 2017; Trusts and Estates, 2010-2021

Selected for inclusion in *Kentucky Super Lawyers*®, Estate & Probate, 2010-2021

American College of Trust and Estate Counsel, Fellow, Elected 2010

Memberships & Affiliations

Missouri Bar Association, 1994

Illinois Bar Association, 1997

Kentucky Bar Association, 1998

Indiana State Bar Association, 2001

Louisville Bar Association, Probate Section - 2009 Vice Chair, 2010 Chair

Estate Planning Council of Metro Louisville - 2013 President

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EDUCATION

Washington University, LL.M.,
1998

Indiana University, M.A., 1995

Indiana University Maurer School
of Law, J.D., 1993

Indiana University, B.A., 1990,
*summa cum laude, with honors in
English*

Publications

"Disclaimer Trusts: A Flexible Choice for Many Couples", Kentucky Bar Association - Bench and Bar, January 2006

"Is Kentucky's statutory form Living Will Directive adequate to address end-of-life decisions made for me by my Health Care Surrogate?", Ask the Legal Professional, May 2005

"How does Kentucky's newly revised Principal and Income Act affect the administration of my trust or estate?", Ask the Legal Professional, May 2004

News

January 6, 2016

What to do with your winning Powerball ticket
WDRB.com

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Continuing Legal Education Presentations

48th Annual Midwest/Midsouth Estate Planning Institute, "Fog and Confusion: Modifying Irrevocable Trusts," July 30, 2021, sponsored by the Office of Continuing Legal Education of the University of Kentucky College of Law

42nd Annual Midwest/Midsouth Estate Planning Institute, A "Checklist" For Preparing A Client for Disability, July 16, 2015, sponsored by the Office of Continuing Legal Education of the University of Kentucky College of Law

37th Annual Midwest/Midsouth Estate Planning Institute, *Impact of Post-Death/Post-Valuation Date Events on Valuation of Assets/Deductions for Federal Estate Tax Purposes (Section 2053 Final Regulations)*, July 23, 2010, sponsored by the Office of Continuing Legal Education of the University of Kentucky College of Law

A Practical Guide for Using Disclaimer Trusts in Indiana, January 9, 2007, sponsored by the Southern Indiana Estate Planning Council

33rd Annual Midwest/Midsouth Estate Planning Institute - *You're Not Rich Enough, But We've Got Something For You Anyway*, July 14, 2006, sponsored by the Office of Continuing Legal Education of the University of Kentucky College of Law

Panel Discussion on Update on FLP's and LLC's and Current Developments on Valuation Related Issues, June 14, 2006, sponsored by the Louisville Bar Association

Panel Discussion on Recent Case Law Concerning Family Limited Partnerships and LLC's, November 17, 2005, sponsored by the Estate Planning Council of Louisville

32nd Annual Midwest/Midsouth Estate Planning Institute - To Disclaim or Not to Disclaim: Effective Use of Disclaimers in Estate Planning (with John T. Bondurant), July 22, 2005, sponsored by the Office of Continuing Legal Education of the University of Kentucky College of Law

Eighth Annual Estate Planning Institute - Recent Developments in the Use of FLPs and LLCs in Estate Planning, April 29, 2005, sponsored by the Louis D. Brandeis School of Law of the University of Louisville

2004 Tax and Wealth Transfer Planning Update - Recent Developments Regarding Wealth Transfer Planning Using FLPs and LLCs, December 7, 2004, sponsored by Louisville Bar Association

31st Annual Midwest/Midsouth Estate Planning Institute - The Initial Contact with the Client, July 15, 2004, sponsored by the Office of Continuing Legal Education of the University of Kentucky College of Law

Panel Discussion on FLPs and LLCs: Valuation Issues from the Appraiser's Perspective, April 20, 2004, sponsored by Louisville Bar Association

A Primer on S Corporations in Kentucky - Wealth Transfer Planning With S Corporation Stock, September 24, 2003, sponsored by Lorman Education Services

LLC's: Advising Closely-Held Companies in Kentucky - Family Wealth Transfer Planning Using LLC's, June 4, 2003, sponsored by Lorman Education Services

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2003 KBA Mid-Year Convention at Orlando, Florida - *Recent Developments in the Use of Family Limited Liability Companies and Family Limited Partnerships in Estate Planning*, April 9, 2003, sponsored by Kentucky Bar Association

Family Limited Partnerships in Kentucky, January 14, 2003, sponsored by National Business Institute

Estate Planning in Kentucky - Family Business and Succession Planning; Using Insurance to Fund Buy-Sell Agreements, Taxation of Equity Split-Dollar Life Insurance Agreements, Recent Developments in the Use of Family Limited Partnerships and Family Limited Liability Companies, May 22, 2003, sponsored by Lorman Education Services

Sixth Annual Estate Planning Institute - Use of Family LLCs and Family Limited Partnerships in Estate Planning, April 25, 2003, sponsored by the Louis D. Brandeis School of Law of the University of Louisville

FLP's and LLC's from Start to Finish, February 14, 2002, sponsored by Louisville Bar Association

Estate Planning in Kentucky - Family Business and Succession Planning: Buy-Sell Agreements, Split-Dollar Life Insurance Agreements, Family Limited Partnerships and Family Limited Liability Companies, May 11, 2001, sponsored by Lorman Education Services

Organizing and Managing the Family Limited Partnership and the Family Limited Liability Company, January 23, 2001, sponsored by Louisville Bar Association

Civic & Charitable Organizations

Louisville-Thruston Chapter of the Kentucky Society of the Sons of the American Revolution