



## CHARLES A. REDD

Partner

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Charles A. "Clary" Redd concentrates his practice in estate planning, estate and trust administration and estate and trust-related litigation. Prior to joining the firm, Clary was a partner with another large law firm where he served as Vice Chair of its Trusts & Estates Practice Group. He was previously employed as a trust administrator by First Wisconsin Trust Company (now U.S. Bank, N.A.) in Milwaukee and as an assistant counsel by Centerre Trust Company of St. Louis (now U.S. Trust Bank of America Private Wealth Management).

Clary has extensive experience and expertise in: (a) the drafting of wills, trust instruments, durable powers of attorney, marital agreements and other estate planning documents; (b) pre- and post-death tax planning for individuals, trusts and estates; (c) preparation and filing of estate tax returns, gift tax returns and fiduciary income tax returns; (d) representation of individual and corporate fiduciaries; and (e) litigation in the Probate Division and other equity divisions of the Circuit Court. He has worked on estates and estate planning projects involving assets valued at several hundred million dollars and has successfully handled numerous estate tax matters, gift tax matters, generation-skipping transfer tax matters, will and trust construction cases, will contests, contests of trust agreements, breach of fiduciary duty cases and other types of cases involving estates and trusts.

### OF NOTE

Clary was chairman of The Missouri Bar's Health Care Durable Power of Attorney Subcommittee, and he played a significant role in the drafting and enactment of the Missouri Durable Power of Attorney for Health Care Act.

He is an elected member of The American Law Institute, a fellow of The American College of Trust and Estate Counsel (Board of Regents; Missouri State Chair; Communications Committee; Estate and Gift Tax Committee; Fiduciary Litigation Committee; and Program Committee) and an adjunct professor of law (Estate Planning) at Northwestern University School of Law. He also serves as Co-Chair of the Editorial Advisory Board of Trusts & Estates magazine. He speaks and writes frequently on topics in the trusts and estates field. Among his numerous nationwide speaking engagements, Clary is the lead presenter in Cannon Financial Institute's monthly estate planning teleconference series.

Clary is a member of St. Louis Venture Partners, the philanthropic affiliate of the St.

### PRACTICE AREAS

- Estate Planning, Estate & Gift Tax
- Nonprofit Tax-Exempt Organizations
- Tax, Trusts and Estates
- Income Tax

### EDUCATION

- Saint Louis University, 1979, J.D.
- Saint Louis University, B.A. History, *summa cum laude*, 1976
  - Phi Beta Kappa

### ADMISSIONS

- Illinois, 1991
- Missouri, 1980
- Wisconsin, 1979
- U.S. District Court for the Eastern District of Wisconsin
- U.S. District Court for the Western District of Wisconsin
- U.S. District Court for the Eastern District of Missouri
- U.S. Tax Court

## Charles A. Redd

Louis Regional Business Council.

### PUBLICATIONS AND PRESENTATIONS

#### Articles

- Articles "And The Winner Is...," *Trusts & Estates*, January 2013 (co-author with Michael O. Hartz and Thomas G. Opferman)
- "Wandry, Wimmer and Windsor," *Trusts & Estates*, January 2013
- "Gridlock Reigns Supreme," *Trusts & Estates*, May 2012
- "The Perfect Storm," *Trusts & Estates*, January 2012
- "Scratching Your Head Over 2010 Estate Plans?" *Trusts & Estates*, August 2010
- "The Effective Use of Disclaimers in Estate Administration," *Illinois Estate Administration*, IICLE, 2009 (co-author with Eileen B. Trost and Michael E. Morden)
- "Business Succession or Business Cessation? Passing the Torch Without Dousing the Flame," 42nd Annual Heckerling Institute on Estate Planning (Matthew Bender and Company/LexisNexis, June 2008)
- "Sharing Exemptions? Not So Fast," *Trusts & Estates*, April 2008
- "Peace in the Sandbox," *Trusts & Estates*, March 2008
- "A Well-Intentioned Mistake: Revenue Procedure 2005-24," *Trusts & Estates*, January 2006
- "Establishment and Administration of Dynasty Trusts," 57th Institute on Federal Taxation--Major Tax Planning for 2005 (Matthew Bender and Company/LexisNexis, 2005)

#### Speaking Engagements

- "Hail to the Chief and Thank Goodness the Election is Over: An Industry Outlook for Wealth Transfer Advisors," 49th Annual Hawaii Tax Institute, Hawaii Tax Institute Foundation and Chaminade University of Honolulu, November 7, 2012
- "Passing the Baton to the Next Generation: Wealth Transfer Planning for Closely Held Business Owners," 49th Annual Hawaii Tax Institute, Hawaii Tax Institute Foundation and Chaminade University of Honolulu, November 5, 2012
- "Valuation Discounts and Estate Planning - Not Necessarily a Marriage Made in Heaven," 47th Annual Southern Federal Tax Institute, October 18, 2012
- "Current Ethical Issues for the Estate Planner," 39th Annual Midwest-Midsouth Estate Planning Institute, University of Kentucky College of Law, July 27, 2012
- "Wealth Transfer Planning After the 2010 Tax Act," 48th Annual Hawaii Tax Institute, Hawaii Tax Institute Foundation and Chaminade University of Honolulu, December 5, 2011
- "Trustee Responsibility to Beneficiaries and Vice Versa," 48th Annual Hawaii Tax Institute, Hawaii Tax Institute Foundation and Chaminade University of Honolulu, December 6, 2011
- "Valuation Discounts and Estate Planning - Not Necessarily a Marriage Made in Heaven," 30th Annual American Association of Appraisers Business Valuation Conference, October 10, 2011
- "Trustee Discretion: You May Not Have What You Think You Have," Representing Estate and Trust Beneficiaries and Fiduciaries, ALL-ABA, July 14, 2011 (co-presenter with Thomas G. Opferman)

## Charles A. Redd

- "GST Planning, Unique Issues in Light of the Temporary Federal GST Tax Repeal and Resulting Uncertainty," 47th Annual Hawaii Tax Institute, Hawaii Tax Institute Foundation and Chaminade University of Honolulu, November 2, 2010
- "Wealth Transfer Advisor`s Industry Outlook - Where Are We Now and What Do We Do Next?," 47th Annual Hawaii Tax Institute, Hawaii Tax Institute Foundation and Chaminade University of Honolulu, November 1, 2010
- "Estate Planning with Grantor Trusts," 46th Annual Hawaii Tax Institute, Hawaii Tax Institute Foundation and Chaminade University of Honolulu, October 22, 2009
- "Often Overlooked Elements of Business Succession Planning," 46th Annual Hawaii Tax Institute, Hawaii Tax Institute Foundation and Chaminade University of Honolulu, October 21, 2009
- "Business Succession Planning," 42nd Annual Philip E. Heckerling University of Miami School of Law Institute on Estate Planning, January 15, 2008
- "Charitable Planning Update--The 2006 Legislation," 2006 Fall Meeting, The American College of Trust and Estate Counsel, October 13, 2006
- "Establishment and Administration of Dynasty Trusts," 57th Institute on Federal Taxation, University of Southern California Law School, January 26, 2005

### PROFESSIONAL AND CIVIC ACTIVITIES

- American Bar Association
  - Section of Real Property, Probate and Trust Law
- State Bar of Wisconsin
- The Missouri Bar
  - Probate and Trust Committee
- Illinois State Bar Association
  - Section on Trusts and Estates
- The Bar Association of Metropolitan St. Louis
  - Probate and Trust Section, member and past Chairman
- Estate Planning Council of St. Louis

### RECOGNITIONS

- Received The Missouri Bar President's Award, 1991
- Recognized in Missouri & Kansas SuperLawyers
- Recognized in The Best Lawyers in America
- Recognized as Best Lawyers' 2012 St. Louis Trusts and Estates Lawyer of the Year and 2012-2013 St. Louis Litigation - Trusts and Estates Lawyer of the Year
- Nationally ranked in Chambers USA in its "Wealth Management" category