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SERVICES

Corporate
Corporate Governance
Business Succession Planning
Estate Planning and Administration
Private Client
Charitable Trust Modification
Family Business
Retirement Planning
Private Client Services for the LGBTQ+ Community
Employee Stock Ownership Plans (ESOPs)

Bob Louis is a partner in the Estate Planning and Administration Practice. He has many years of experience in assisting clients in preserving and passing on wealth and business ownership across the generations. In this work, he helps clients to develop family business succession plans, often involving benefit planning. He also assists with estate planning, including the preparation of wills, trusts and other estate planning documents, to further the process of wealth preservation and transfer, and to deal with the varying interests and needs of family members. A significant part of Bob's practice focuses on retirement plans, executive compensation, employee benefits, and tax and estate planning for those kinds of benefits. He advises clients on the methods of planning for a happy and rewarding retirement. Based on more than 40 years of experience with employee benefits and tax planning, Bob is a skilled retirement coach.

Bob enjoys explaining and demystifying these sometimes complex issues. He is the Editor of Personal Wealth Law News, a law blog hosted by the Firm that reviews developments in retirement, estate planning and other wealth-related issues. To read his blog, please click **here** . Bob has also written articles for the *Legal Intelligencer* on retirement planning issues. He is a frequent lecturer and writer on these topics to various groups, and regularly presents at Pennsylvania Bar Institute programs.

EXPERIENCE

- Helped a family transfer ownership of a business to some members of the next generation, while producing alternate inheritances to other family members. This included the use of grantor retained annuity trusts and qualified personal residence trusts.
- Advised another owner who did not wish to transfer ownership to family members to sell his business and then prepared estate planning documents so that the sale proceeds could support the family for several generations.
- Represented members of a family members in a dispute and litigation involving the mismanagement of an estate and trust, resulting in a favorable settlement after mediation that corrected the errors made in carrying out the older generation's estate plan.

- Advised the trustee of a trust supporting one of the largest public art collections in the Philadelphia region on the lending of art and the preservation of the collection.
- Advised a family business on the adoption of an informal pension arrangement that helped the senior generation of the family to move toward retirement and relinquish control of the business.
- For several other businesses, prepared qualified retirement plans and obtained IRS approval for them, made necessary amendments as the applicable law changed, and advised on distribution and participation rules.
- Advised a client on estate and estate and trust planning for valuable works of art, to permit their transfer in a tax-efficient manner.
- Prepared an estate plan for a family that took into account the care of a special needs child, to work in conjunction with governmental benefits.
- Worked with a university foundation on the adoption of a tax-sheltered annuity program for its employees.
- Advised the administrators of the retirement plans of a large governmental employer on maintaining their qualified status under changes to applicable law, and reviewed documents relating to their trust investments.
- Prepared employee stock ownership plans for large and medium-sized employers to permit employees to share in ownership.
- Provided a "retirement checkup" to a corporate executive preparing to retire, reviewing his pension benefits, forms of insurance, estate plans and retirement goals.

HONORS

Awarded the Philadelphia Volunteer Lawyer of the Year Award by the Arts + Business Council of Greater Philadelphia, 2018

Named to the *Pennsylvania Super Lawyers* List for Estate & Probate law, 2005 to 2012, 2014 to present

Selected for the Coleman Award by the Philadelphia Volunteer Lawyers for the Arts

MEMBERSHIPS AND AFFILIATIONS

Chair, Financial Services & Retirement Planning Committee of the American Bar Association Senior Lawyers Division, 2019-2020

Advisory Board Member, Initiative for Family Business and Entrepreneurship, St. Joseph University Erivan K. Haub School of Business

Sustaining Life Fellow, American Bar Foundation

Life Fellow, Pennsylvania Bar Foundation

Philadelphia Bar Foundation (Past Trustee and Assistant Treasurer)

Board of Managers and Vice President, Spring Garden Soup Society

Co-Chair, Business Planning Committee; Probate and Trust Law Section, Philadelphia Bar Association (Past Chair; Past Vice Chair and Secretary; Past Chair and Member, Publications Committee)

Tax Law Section, Pennsylvania Bar Association (Past Chair; Past Vice Chair; Past Secretary; Past Council Member; Past Newsletter Editor)

Taxation Section and Employee Benefits Committee; Senior Lawyers Division, American Bar Association

Philadelphia Estate Planning Council

Volunteer, Philadelphia Volunteer Lawyers for the Arts (Past President, Board of Directors)

Board of Directors , Senior Artists Initiative (Past President)

Friends of Briar Bush (Past President, Past Secretary, Past Board member)

Abington Art Center (Past Chairman)

Board of Directors, Abington Township Public Library (Past President)

Fellow, American College of Tax Counsel

Harvard Law School Association of Philadelphia

World Link Foundation (Past Board member and Past Treasurer)

Family Firm Institute, Mid-Atlantic Chapter (Founding President and Past Director)

Friends of Fish Foundation (Past Trustee)

Fund for the School District of Philadelphia (Past Counsel and Secretary)

Barnes Foundation (Past Professional Advisors Council Member)

EDUCATION

LL.M., Temple University James E. Beasley School of Law, 1976

J.D., Harvard Law School, 1972, *cum laude*

B.S., The Wharton School, University of Pennsylvania, 1969, *summa cum laude*

BAR ADMISSION

New Jersey

Pennsylvania

FIRM MANAGEMENT POSITIONS

Benefits Committee, Chair