



DAVID M. BROWN

COUNSEL

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SERVICES

Private Client
Business Succession
Planning
Charitable Trust Modification
Charitable Giving
Estate Planning and
Administration
Family Business
Tax

David Brown helps family businesses and high-net worth individuals navigate legal issues connected to the preservation and transfer of their wealth to subsequent generations or other interested parties. He focuses in particular on estate planning, charitable planning, and trust and estate administration. Drawing on his LL.M. in Taxation, David also advises clients on tax issues that arise in the planning and ongoing administration processes, as well as on legal issues involving asset protection planning strategies.

David's experience includes creating, modifying and reorganizing entities, including limited liability companies and partnerships, in coordination with estate and financial plans. His work in trusts encompasses development of documents to set up grantor retained annuity trusts, qualified personal residence trusts, insurance trusts, charitable trusts and vehicles which contemplate the effect of taxes including the generation-skipping transfer tax. David also helps clients create private charitable foundations, seek tax-exemption rulings, and manage foundation tax compliance.

David appreciates the complexity of the financial issues facing clients and takes a team approach. This includes working with wealth advisors, investment advisors, financial planners, insurance providers, accountants and other advisors. He coordinates with family offices, and guides multi-generational family wealth, business, and charitable planning meetings.

MEMBERSHIPS AND AFFILIATIONS

American Bar Association

Philadelphia Bar Association

Philadelphia Estate Planning Council

Montgomery Bar Association

Planned Giving Advocate, Ursinus College

Ursinus College Law Alumni Group Mentor

EDUCATION

LL.M in Taxation, University of Miami School of Law, 2006

J.D., *cum laude*, University of Miami School of Law, 2005

- School of Law Ambassador
- Student Bar Association
- Entertainment and Sports Law Society

B.A., *cum laude*, Ursinus College, 2002

BAR ADMISSION

Florida

New Jersey

Pennsylvania