CAPLIN & DRYSDALE

Alison F. Egan

MEMBER

WASHINGTON, D.C.

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PRIVATE CLIENT | INTERNATIONAL TAX

"She has an amazing technical ability and provides terrific client service" – *Chambers High Net Worth*

Alison Egan is a Member in the Private Client and International Tax practice groups.

Ms. Egan's practice centers on assisting high-net-worth individuals and their families with tax and wealth preservation planning. She counsels her clients on the design of estate and business planning strategies that are both tax-efficient and tailored to each family's personal values and business goals. Ms. Egan advises both domestic and international families on the use of sophisticated structures to implement multigenerational wealth transfers.

Services

Ms. Egan is skilled at identifying critical issues, asking probing questions, and utilizing rigorous analysis to arrive at the best solutions for her clients. She is very comfortable employing quantitative analysis to produce insights into the income, estate, gift, and generation-skipping tax implications of complex planning techniques. Ms. Egan's clients appreciate her clear and straightforward communications.

Examples of Ms. Egan's services for clients have included:

- crafting trusts to ensure future generations' access to wealth reflects the interests of the client;
- designing and managing sophisticated international estate plans with sizable privately held business interests;
- overseeing all aspects of major gift transactions, including sales to intentionally defective grantor trusts and transfers to GRATs;
- researching and drafting a private letter ruling request for trustees of a large marital trust to address concerns about tax treatment of a potential distribution;
- leading the compilation of a complex estate tax return in a matter involving multiple interested and separately represented parties; and

- advising a major international corporation on its creation of a grantor trust.

Highlights

Ms. Egan was Of Counsel at Caplin & Drysdale in 2020 when she was ranked as “Up and Coming” in the 2020 *Chambers High Net Worth Guide*. Prior to returning to the firm in 2023, she served as the Vice President, Legal at one of the largest privately-held companies in the Washington, D.C. metropolitan area.

Admissions & Education

ADMISSIONS

District of Columbia

New York

EDUCATION

J.D., Yale Law School, 2006, *Managing Editor, The Yale Law Journal*

A.B., Harvard University, 2001, *summa cum laude, Phi Beta Kappa*

Recognitions & Noteworthy

HONORS & RECOGNITIONS

Chambers High Net Worth Guide, Private Wealth Law, D.C., 2020

Professional Activities & Affiliations

PROFESSIONAL ACTIVITIES

Participant, American College of Trust and Estate Counsel (ACTEC) Mid-Atlantic Fellows Institute, 2019 – 2020

Member, D.C. Bar Estates, Trusts, and Probate Law Community

Member, D.C. Bar Taxation Community

Newsroom & Publications

NEWS

Alison Egan Accepted into the Mid-Atlantic Fellows Institute of the American College of Trust and Estate Counsel
09.11.2019

8 Caplin & Drysdale Attorneys Contribute to ABA's Annual Section of Taxation May Meeting
05.03.2019

Caplin & Drysdale Promotes Estate Planning Lawyer Alison Egan to Of Counsel
01.02.2019

Tax Notes Quotes Alison Egan on IRS Regulations Against Use of Multiple Trusts
Tax Notes , 08.09.2018

Caplin & Drysdale Proudly Supports the National Women's Law Center
10.23.2017

SPEAKING ENGAGEMENTS

Alison Egan Discusses Allocation of Trust Distributable Net Income on Strafford Webinar
Virtual, 10.08.2019

Alison Egan Explores Inclusion of Capital Gains in Distributable Net Income for Trusts and Estates on Strafford Webinar
Virtual, 09.19.2019

Alison Egan Joins Panel on Cross-Border Estate Planning at ABA May Tax Meeting
05.11.2019

Alison Egan Addresses Multistate Allocation of Trust Distributable Net Income on Strafford Webinar
02.21.2019

PUBLICATIONS & ALERTS

Congress Takes the Stretch Out of IRAs (and Other Retirement Assets)
Private Client Alert | 01.06.2020

Tax Problems Loom in the College Admissions Scandal
Tax Alert | 03.18.2019

UPDATED: Year-End Charitable Giving Ideas: IRA Rollovers and "Bunching" Charitable Deductions
Private Client Alert | 11.28.2018

2018 Ushers In New Estate Planning Opportunities and Pitfalls
Private Client Alert | 01.18.2018