

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

01.02.2019

Caplin & Drysdale announced that effective January 1, 2019, Alison Egan became Of Counsel at the firm. Ms. Egan works primarily in the firm's Private Client and International Tax practice groups, assisting high-net-worth individuals and their families by designing and implementing tailored strategies to preserve their wealth for future generations. As part of her practice, Ms. Egan advises domestic and international clients on tax and estate planning, lifetime wealth transfers, and the administration of estates and trusts.

Drawing on her experiences working in both business and the nonprofit sector, Ms. Egan is skilled at identifying critical issues, asking probing questions, and utilizing rigorous analysis to arrive at the best solutions for her clients. Ms. Egan has a high degree of comfort using quantitative analysis to produce insights into the estate, gift, generation-skipping, and income tax implications of sophisticated planning options, and she takes pride in producing straightforward and accessible communications for her clients outlining their proposed estate plans.

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

- crafting trusts to ensure future generations' access to wealth aligns with 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.

Ms. Egan earned her law degree from Yale Law School, where she was Managing Editor of The Yale Law Journal, and she graduated summa cum laude, Phi Beta Kappa from Harvard University with a degree in applied mathematics.

Attorneys

Alison F. Egan