

## STEVEN J. TACKETT

**Steve Tackett's** practice covers all aspects of an active estate planning, probate, mediation, and tax law practice. Mr. Tackett's extensive estate planning practice involves the design and implementation of traditional and non-traditional estate plans for both U.S. and non-U.S. clients of the firm, including the use of revocable or irrevocable trusts, testamentary and lifetime gift planning, marital property agreements, life insurance and life insurance trusts, non-profit corporations and charitable trusts and private foundations, as well as coordination and disposition non probate assets such as contractual benefits held in qualified plans or individual retirement accounts (IRAs), and business succession planning involving the use of corporations, general or limited partnerships and limited liability companies.

Mr. Tackett's probate practice includes the probate of wills and the determination of heirship of decedents dying without wills. Mr. Tackett is highly experienced in the judicial construction, reformation, modification, and termination of trusts as well as in the representation of executors, trustees and beneficiaries in the administration, settlement, and distribution of estates or trusts. Mr. Tackett serves as a Qualified Impartial Third Party or Mediator in the private or court-referred mediation or arbitration of disputes involving estates, probates, trusts, marital property disputes, charitable organizations, and estate, gift, and generation-skipping transfer tax issues. Mr. Tackett's tax practice includes the representation of clients with tax controversies pending before the Internal Revenue Service and state tax agencies. As both an attorney in private practice and as a former estate tax attorney with the Internal Revenue Service, Mr. Tackett has substantial experience in the preparation, examination, and appeal of federal estate and gift tax returns, state death tax returns, and state and federal generation-skipping transfer tax returns.

### Education

University of Texas School of Law (J.D., 1971)  
 - Director, Texas Legal Research Board  
 University of Texas at Austin (B.A., Government, 1968)

### Professional Affiliations and Honors

Board Certified, Estate Planning and Probate Law (Texas Board of Legal Specialization)  
 American Bar Association

- Real Property, Probate and Trust Law Section
- Dispute Resolution Section
- Business Law Section
- Taxation Section

State Bar of Texas

- Real Estate, Probate, and Trust Law Section
  - Estate Taxation Editor of Section Newsletter, 1992-1994
- Alternative Dispute Resolution Section
- Business Law Section
- Taxation Section
- Director, Advanced Estate Planning Strategies Course, 2002
- Planning Committee, Advanced Estate Strategies Course, 2001-2003
- Director, Advanced Estate Planning and Probate Course, 1995
- Planning Committee, Advanced Estate Planning and Probate Course, 1984, 1985, 1986-1990, 1993, 1995 1996, 2000 - 2002

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Austin Bar Association

- Estate Planning and Probate Law Section
  - Past Chair
- Business, Corporation & Taxation Section
- Board of Directors, 1998 -1999
- Course Director, Wills and Probate Institute, 1998

South Texas College of Law, Wills and Probate Institute

- Course Director, 1997
- Planning Committee, 1993 -1994, 1997-2000

Admitted United States Tax Court, 1985

American College of Trust and Estate Counsel (ACTEC), Fellow

Texas Academy of Probate and Trust Lawyers, Fellow

Texas Bar Foundation, Life Fellow

College of the State Bar of Texas

Travis County Bar Foundation, Founding Fellow

Past President and Member, Estate Planning Council of Central Texas

National Committee on Planned Giving, Central Texas Chapter, Director

International Academy of Collaborative Professionals

Collaborative Law Institute of Texas

Court Qualified Impartial Third Party (Mediator)

Listed in America's Registry of Outstanding Professionals, 2002-2003

Listed in *The Best Lawyers in America*

Texas Super Lawyer (2003 through 2008)

*Texas Monthly* and *Law & Politics* magazines

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