CHRISTOPHER (CHRIS) J.C. JONES

MEMBER

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CHARLOTTE

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PRACTICE AREAS

- Closely Held Business & Tax Planning
- Estate & Wealth Planning/ Estate Administration
- Taxation

EDUCATION

- B.A., University of Virginia, 1994
- J.D., Nova Southeastern University, 1997, magna cum laude; Member, Journal of International and Comparative Law; Phi Delta Phi, Vice President
- LL.M., Georgetown University Law Center, 1998, Taxation

BAR & COURT ADMISSIONS

- Virginia, 1997
- North Carolina, 1999

OTHER AREAS OF LAW

- Partnerships, Corporate (C Corp & S Corp) and Individual Income Taxation
- Life Insurance Planning
- Charitable Planning

An author and frequent speaker at professional conferences on tax planning, estate planning, international tax and estate planning, choice of entity and asset protection planning topics, Chris Jones provides sophisticated tax advice and counsel to many family and closely held businesses.

In serving his closely held business clients, Mr. Jones often acts as a trusted advisor providing advice and counsel on common issues including:

- Tax Issues;
- Buying and Selling Businesses and Assets;
- Business Succession Planning;
- Choice of Entity considerations; and
- Operational Issues

A Fellow in the American College of Trust and Estate Counsel (ACTEC) and a board certified specialist in estate planning and probate law, Mr. Jones also provides cutting edge estate planning, tax planning, asset protection planning and charitable advice to high net-worth individuals and owners of closely-held businesses.

Mr. Jones also assists non-citizen and nonresident alien clients to structure their estate and business succession plans, and provides wide ranging services in the area of international estate planning including domestic wills for non-citizens, foreign trusts, foreign business entities and pre-immigration planning.

CONTINUED

- Tax Controversy
- Non-Profit Entity Planning

CHRISTOPHER (CHRIS) J.C. JONES

SPEAKING ENGAGEMENTS

- "The Appraisal Process and Ten Valuation Opportunities Beyond the Traditional FLP Approach," September 23, 2011, Southern Federal Tax Institute, Atlanta, GA.
- "Eye of the Storm? A Review of the Tax Relief, Unemployment Insurance Reauthorization and Job Creation Act of 2010," February 21, 2011, NC Bar Association, Webinar.
- "Recent Developments in Estate Planning and Fiduciary Law," October 8, 2010, NC Bar Association, Greensboro, NC.
- "Insurance Planning Post-Meltdown: What's In, What's Out, What's Uncertain," October 1, 2010, Southern Federal Tax Institute, Atlanta, GA.
- "Recent Developments in Estate Planning and Fiduciary Law," July 22, 2010, NC Bar Association, Kiawah Island, SC.
- "Recent Developments in Federal Tax Law," July 16, 2009, NC Bar Association, Kiawah Island, SC.
- "Estate and Tax Planning for Liquidity Events," January 21, 2009, NC Bar Association, Greensboro, NC.
- "The Life Cycle of Family Limited Partnerships," December 11, 2008, Tennessee Federal Tax Institute, Nashville, TN.
- "Advanced Topics in Estate Planning," January 2007, Mecklenburg County Bar Association, Charlotte, NC
- "Estate Planning for the Closely-Held Business Owner," November 2005, Lorman Education, Charlotte, NC
- "Asset Protection Planning," December 2004, North Carolina Bar Association, Greensboro, NC
- "Choice of Entity," November 2004, Lorman Education, Charlotte, NC
- "Recent Developments in Valuation," November 2004, Lorman Education, Charlotte, NC
- "Asset Protection Planning," September 2004, Mecklenburg County Bar Association, Charlotte, NC

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- "Asset Protection Planning with Trusts," January 2004, Queens College Estate Planner's Day, Charlotte, NC
- "Estate Planning for the Family Business," November 2003, Lorman Education, Charlotte, NC

PUBLICATIONS

- Author, "The Basics of U.S. Taxation of Nonresident Aliens – The Transfer Tax Aspects," *The Will & The Way*, September 2010
- Co-Author, "Income Tax Considerations in Structuring the Sale of S Corporation Stock to a Trust," *Probate & Property,* July/August 2010
- Author, "The Basics of U.S. Taxation of Nonresident Aliens – The Income Tax Aspects – Part One," *The Will & The Way,* May 2010
- Author, "Planning Can Limit Reach of Creditors," *Charlotte Business Journal,* October 27, 2006
- Author, "Using LLCs as Trust Substitutes," *Probate and Property*, published in two parts, December 2003 and January 2004

OF NOTE

- Fellow, American College of Trust and Estate Counsel
- Trustee, Southern Federal Tax Institute
- North Carolina Bar Board Certified Specialist in Estate Planning and Probate Law
- Chairman, Mecklenburg County Bar Estate Planning and Probate Section, 2007-2009
- Former captain, The University of Virginia baseball team
- LL.M. degree in Taxation, The Georgetown University Law Center
- Active in numerous community organizations, including coaching several youth sports teams and serving on the Board of Directors of the North Meck Soccer Club

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PROFESSIONAL AFFILIATIONS

- Mecklenburg County Bar Association: Past Chairman, Estate Planning and Probate Section
- North Carolina Bar Board Certified Specialist in Estate Planning and Probate Law
- American Bar Association: Tax Section, Real Property, Probate and Trusts Section
- North Carolina Bar Association: Tax Section, Estate Planning and Fiduciary Law Section
- American College of Trust and Estate Counsel, Fellow
- Southern Federal Tax Institute, Trustee