

PRACTICE AREAS

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

EDUCATION

- B.S., Salisbury State University, 1992
- J.D., Temple University, 1996
- LL.M., Temple University, 1997

BAR & COURT ADMISSIONS

- North Carolina, 1996

OTHER AREAS OF LAW

- Limited partnership
- Limited liability companies
- Corporations
- Asset protection planning
- Charitable planning

BETH A. WOOD



MEMBER

100 North Tryon Street
Suite 4700
Charlotte, NC 28202-4003

CHARLOTTE

TEL: (704) 331-1020
FAX: (704) 378-2020

bethwood@mvalaw.com

With extensive experience in the representation of high net-worth individuals and closely-held businesses, Beth Wood's practice includes the development and implementation of sophisticated and comprehensive estate and tax planning strategies to minimize the impact of state and federal gift, estate, and generation-skipping transfer taxation.

Ms. Wood advises clients in connection with the creation of highly customized estate and tax plans, incorporating the use of defective and non-defective grantor trusts, limited partnerships, limited liability companies and corporations, often coupled with unique gift and sales transactions. Ms. Wood works closely with multiple generations of families, as well as their financial advisors, accountants and other professionals, to ensure the efficient accomplishment of client objectives and the seamless continuity of closely-held businesses. After the death of a client, Ms. Wood works with families, closely-held businesses and other related professionals to ensure that the plan adopted by the client during lifetime is respected.

Ms. Wood has experience in gift and estate tax audit procedures. The charitable aspects of Ms. Wood's practice involve the formation of public charities and private foundations, the creation and funding of charitable trusts, and the counsel of public charities and universities regarding a number of tax and non-tax issues.

Ms. Wood earned an LL.M. in Taxation, with honors, as well as her Juris Doctor with a concentration in taxation, from Temple University. She earned her Bachelors of Science degree from Salisbury State University.

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BETH A. WOOD

OF NOTE

- Authored "*Joint Revocable Trusts: New Flexibility in an Old Form*" published in *Probate and Property* in July of 2005.
- Lectured in areas related to estate and tax planning.

PROFESSIONAL AFFILIATIONS

- American Bar Association: Taxation Section, and Real Property, Probate and Trust Law Section
- North Carolina Bar Association: Taxation Section and Estate Planning and Fiduciary Law Section
- Charlotte Estate Planning Council, Member