BRADLEY (BRAD) T. VAN HOY

MEMBER

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

CHARLOTTE

TEL: (704) 331-3553
FAX: (704) 339-5953

bradvanhoy@mvalaw.com

A member of Moore & Van Allen's Wealth Transfer Planning Team, Brad Van Hoy has significant experience in assisting high net worth clients and closely held business owners achieve their estate, tax, asset protection and business planning goals. Whether crafting an estate or tax plan, advising on estate or trust administration issues, providing counsel with respect to closely-held business operation and succession issues, or assisting in the purchase or sale of a client's business, Mr. Van Hoy enjoys working collaboratively with his clients and their other advisors to devise and implement the client's desired plan efficiently and effectively.

A speaker on estate and tax planning topics, Mr. Van Hoy provides sophisticated advice and counsel across a broad range of estate, gift and generation-skipping transfer tax issues and planning techniques, including testamentary estate and tax planning, structuring and implementing sophisticated lifetime leveraged gifting techniques such as sales to defective grantor trusts, grantor retained annuity trusts (GRATs), gift and sale transfers of interests in limited partnerships and limited liability companies, and qualified personal residence trusts (QPRTs), and insurance planning.

With respect to his clients who are closely held business owners, Mr. Van Hoy works as a trusted advisor with the owner and the owner's family, providing counsel regarding the purchase or sale of a business, the structuring of business succession plans and the transfers of interests in the businesses to subsequent generations.

PRACTICE AREAS

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

EDUCATION

- B.A., University of North Carolina at Chapel Hill, 1997, with distinction; Herbert Worth Jackson scholar; Phi Beta Kappa; Honors Program; Phi Eta Sigma
- J.D., University of North Carolina at Chapel Hill, 2000, with honors; Maurice T. Van Hecke Law scholarship; Staff, Journal of International Law

BAR & COURT ADMISSIONS

- North Carolina, 2000

CONTINUED

BRADLEY (BRAD) T. VAN HOY

Mr. Van Hoy's representative client services include:

Estate Planning

Tax Planning

Asset Protection Planning

Estate and Trust Administration (including supervising the preparation and filling of estate tax returns and fiduciary income tax returns)

Premarital Agreements

Insurance Planning

Past Speaking Engagements

- "Eye of the Storm," A Review of the Tax Relief, Unemployment Insurance Reauthorization and Job Creation Act of 2010," NC Bar Association, Webinar (February 2011)
- "Estate Planning Update," 2011 Annual Review, Mecklenburg County Bar Association, Charlotte, NC (February 2011)
- "Who, When, How and What of CRATS, CRUTS, CLATS, and CLUTS," Lorman Education Services Seminar, Charlotte, NC (September 2006)

OF NOTE

- Served as Co-Chair of the Estate Planning and Probate Section of the Mecklenburg Bar Association (2009 - 2010)
- Served on the Public Service Advisory Committee of the North Carolina Bar Association (2006 - 2009)
- Served on the CLE Committee for the Estate Planning and Fiduciary Law Section of the North Carolina Bar Association (2005 - 2008)
- Selected for inclusion to the 2010 North Carolina Rising Stars list, which is included in the *North Carolina Super Lawyers* magazine

CONTINUED

BRADLEY (BRAD) T. VAN HOY

PROFESSIONAL AFFILIATIONS

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