Moore&VanAllen

KENNETH "KEN" S. COE

Member, Wealth & Estate Planning

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Ken Coe strives to take a sophisticated yet practical approach to the practice of law and the counsel and advice given to clients and their families.

Ken advises business clients who represent a broad spectrum of industries and a wide range of business functions. Ken's clients benefit from his ongoing working familiarity with various income, gift and estate tax matters, contracts of all kinds, shareholder, partnership agreements, limited liability company arrangements, real estate activities of all types and the purchase, sale and transfer of significant assets and the valuation issues and planning opportunities associated with those assets.Ken works diligently to facilitate a client's understanding of the approach being taken. In today's environment of voluminous legal documentation, Ken believes that it is important for the client to know and understand the provisions and objectives of each document.

As a member of Moore & Van Allen's multi-faceted Estate and Wealth Planning group, Ken is adept to sophisticated advanced tax planning techniques which he coordinates with team members and implements for clients on an ongoing basis.

It is typical for many of Ken's clients to own significant interests in real estate. Ken focuses on the potentially creative opportunities that real estate properties of all types offer for tax and business planning purposes. In addition to planning opportunities with real estate, he is also involved with the transactional real estate needs of clients, whether it is the purchase, sale, financing, leasing and/or development of the applicable real estate interests.

Representative Client Services

Capabilities

Closely Held Business & Tax Planning

Family Office & Private Investment

International Estate Planning

Trust, Estate, Tax & Fiduciary Disputes

Wealth, Trust & Estate Planning

Education

A.B., University of North Carolina at Chapel Hill, 1972, Morehead Scholar; Phi Beta Kappa

J.D., Duke University, 1976

Admissions

North Carolina, 1976

Other Areas of Law

Arbitration
Asset Protection
Business Succession Planning
Shareholder, Partnership and LLC Operating Agreements
Business Combinations
Real Estate Transactions & Tax Planning with Real Estate Interests

- Estate & Gift Tax Planning
- Estate Administration
- Estate & Gift Tax Audit Representation
- Business Succession Planning
- Business Combinations
- Shareholder Agreements
- Planning with Limited Liability Companies
- Planning with Real Estate Assets and Implementation of Desired Real Estate Transactions

Tax Controversy

Notable

- *Best Lawyers in America,* Tax Law, 2020-2021; Closely Held Companies and Family Business Law, 2021
- Martindale-Hubbell, AV Top Rated Lawyer
- Ken has been actively utilizing limited partnerships and other pass-through entities (now predominantly limited liability companies) for business estate and tax planning purposes for more than 25 years.
- Ken has been serving as an arbitrator on the Commercial Panel of the American Arbitration Association since 1988. Having served on more than 60 occasions either as sole arbitrator or as a member of an arbitration panel throughout North and South Carolina and elsewhere in the Southeast, Ken's experience as an arbitrator gives Ken a unique firsthand perspective on the consequences of "how and what can go wrong" in a business arrangement between third parties. Ken considers this a valuable asset in his ongoing counsel to clients on day to day matters as well as significant transactions.
- Past Lecturer, North Carolina Tax Section & North Carolina Estate and Fiduciary Section
- Former Board Member, O'Herron Family Foundation
- Morehead-Cain Scholarship (various activities)
- Piedmont Club of Charlotte
- Former Board Member, Dowd YMCA
- Former Board Member, Hospice of Charlotte
- Myers Park Presbyterian Church

Affiliations

- American Arbitration Association – Commercial Law: Arbitrator and Panel Member
- American Bar Association: Tax, Probate and Real Property Sections
- North Carolina Bar Association: Tax, Estate and Fiduciary Sections
- Charlotte Estate Planning Council