Moore&VanAllen

CHRISTOPHER "CHRIS" J.C. JONES

Head of Wealth & Estate Planning
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Chris Jones is a nationally recognized specialist in the areas of estate planning and business succession planning. Chris heads the firm’s Wealth & Estate Planning group and has substantial experience advising and counseling clients regarding sophisticated estate planning, business succession, asset protection, charitable planning, and life insurance matters. Understanding that each client has specific, unique objectives, Chris and his team provide creative, customized solutions.

A Fellow in the American College of Trust and Estate Counsel (ACTEC) and a Board Certified Specialist in estate planning and probate law, Chris often acts as the trusted advisor to multiple generations of families assisting and advising on the preservation, protection, and transfer of their wealth. As personal general counsel to his clients, he monitors legal issues, marshals resources, and crafts solutions that protect what matters most to each client.

Chris' representation frequently involves the following:

- Preparation of estate planning documents;
- Structuring and implementing sophisticated lifetime and testamentary wealth transfer techniques including gifts and sales to grantor trusts, Grantor Retained Annuity Trusts (GRATs), and Testamentary Charitable Lead Annuity Trusts (CLATs);
- Trust Modifications and Trust Decanting;
- Irrevocable Life Insurance Trusts (ILITs);
- Charitable Lead and Charitable Remainder Trusts;
- Creation of charitable foundations and non-profit organizations;
- Creation, funding, and maintenance of Limited Liability Companies, Limited Partnerships and S Corporations;

Capabilities

Closely Held Business & Tax Planning

Family Office & Private Investment

Nonprofit Organizations & Charitable Giving

Tax

Trust, Estate, Tax & Fiduciary Disputes

Wealth, Trust & Estate Planning

Education

LL.M., Georgetown University Law Center, 1998, Taxation

J.D., Nova Southeastern University, 1997, magna cum laude

B.A., University of Virginia, 1994

Admissions

North Carolina, 1999

Virginia, 1997

- Helping clients create and operate family offices;
- Complex estate administration;
- Income tax planning to help clients minimize income taxes and maximize basis;
- International estate planning including domestic wills for non-citizens, foreign trusts, pre-immigration planning, and advising on the tax consequences of expatriation; and
- Premarital planning.

An author and frequent speaker at professional conferences, Chris provides sophisticated tax advice and counsel to many family and closely held businesses. In serving his closely held business clients, Chris provides advice and counsel on tax and operational issues as well as business succession planning.

Chris also represents 501(c)(3) nonprofit organizations and their management and has extensive experience advising public charities and private foundations in all aspects of their organization, administration, and management.

Notable

- *Business North Carolina* Legal Elite, Tax Estate, 2021
- *Chambers High Net Worth,* Private Wealth Law, 2019-2021
- *Best Lawyers in America,* Tax Law, 2013-2022; Trust and Estates, 2021-2022; Closely Held Companies and Family Business Law, 2022
- *North Carolina Super Lawyers*, 2020-2022
- North Carolina Bar Board Certified Specialist in Estate Planning and Probate Law
- *Charlotte Magazine,* Five Star Award for Best in Client Satisfaction for Estate Planning Professionals

Affiliations

- Fellow, American College of Trust and Estate Counsel (ACTEC), Business Planning and Fiduciary Income Tax Committee Member
- Past Chairman, Mecklenburg County Bar Association: Estate Planning and Probate Section
- American Bar Association: Tax Section, Real Property, Probate and Trusts Section

Other Areas of Law

Partnerships, Corporate (C Corp & S Corp) and Individual Income Taxation

Life Insurance Planning

Charitable Planning

Tax Controversy

Non-Profit Entity Planning

Business Succession

Asset Protection Planning

Family Office

- North Carolina Bar Association: Tax Section, Estate Planning and Fiduciary Law Section
- Trustee and former President and Chairman of the Board, Southern Federal Tax Institute
- Former Member, Foundation for the Carolinas Cabinet of Professional Advisors
- Former Captain, The University of Virginia baseball team
- LL.M. degree in taxation, The Georgetown University Law Center
- Active in numerous community organizations, including serving on the boards of non-profit organizations