

KATHRYN "KATIE" E. DUFFY

Counsel, Wealth & Estate Planning

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Katie Duffy's practice is focused on estate planning, trust and estate administration, charitable planning, tax planning for high net-worth individuals, business succession, and transactional and business matters that arise in connection with the acquisition, ownership, and operation of closely held businesses.

As a member of the North Carolina, South Carolina and Virginia bars, Katie advises clients in all three states with respect to their personal, financial, tax, business and estate planning needs. Her practice includes advice, preparation and implementation of wills, revocable trusts, irrevocable trusts, powers of attorney, and other documents necessary to accomplish her clients' objectives. She also supports clients' existing and prospective business interests, including business succession planning for family members and key employees such as buy/sell and equity compensation arrangements, business operations and family office structures, and life insurance arrangements. She regularly works with business owners and investors and their related family members, accountants, wealth managers, corporate fiduciaries, life insurance providers, and family office advisors in arriving at comprehensive, creative, and practical solutions to meet her clients' needs.

Katie also assists her clients in achieving their charitable goals. Her practice includes the formation of charitable trusts, non-profit corporations, application for tax-exempt status, and advice and counsel regarding ongoing compliance with state and federal requirements for tax-exempt organizations.

Katie's practice also includes the preparation and review of federal gift and estate tax returns and the representation of clients under audit by the Internal Revenue Service.

Capabilities

Closely Held Business & Tax Planning

Family Office & Private Investment

Nonprofit Organizations & Charitable Giving

Trust, Estate, Tax & Fiduciary Disputes

Wealth, Trust & Estate Planning

Education

J.D., The George Washington University Law School, 2010

B.A., University of Virginia, 2007

Admissions

South Carolina, 2016

North Carolina, 2015

SCOTUS, 2014

Virginia, 2010

KATHRYN "KATIE" E. DUFFY

Notable

- *Best Lawyers in America*, Trusts and Estates "Ones to Watch," 2021-2022

Affiliations

- North Carolina Bar Association: Estate Planning and Fiduciary Law Section; Tax Section; Business Law Section
- South Carolina Bar Association: Corporate Banking & Securities Section; Probate & Estate Planning Section; Tax Law Section; SC Women Lawyers
- North Carolina Association of Women Attorneys
- Mecklenburg Bar Association