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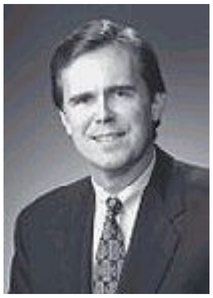

E. Clark Lutz

Born: Pittsburgh, Pennsylvania, July 15, 1956.

Admitted to bar: 1983, Texas, and U.S. Court of Appeals, Fifth Circuit; 1984, U.S. Tax Court.

Education: State University of New York at Geneseo (B.A., magna cum laude, 1977); Syracuse University (J.D., cum laude, 1982). Editor-in-Chief, Syracuse Journal of International Law and Commerce, 1981-1982.

Member: Houston and American Bar Associations; State Bar of Texas; Houston Estate and Financial Forum. (Board Certified, Estate Planning and Probate Law, Texas Board of Legal Specialization).

Practice Areas: Estate Planning Law; Probate Law; Tax Law.

To Contact Clark Lutz, Please Click Here

Graves, Dougherty, Hearon & Moody
515 Congress Ave., Suite 2300
Austin, TX. 78701

Daniel A. Palmer

Born in Lake Charles, Louisiana. Received both his undergraduate degree and law degree from LSU in Baton Rouge, Louisiana. Received a master's degree of law in taxation (LL.M.) from SMU Law School. Danny is a shareholder and director with the law firm Haley & Davis, P.C. and is a Board Certified Tax Attorney by the Louisiana State Bar Association Specialization Board.

Primary areas of concentration are in the fields of estate planning, probate, business planning, employment contracts for physicians, creditor planning, taxation, financial planning for the elderly and employee benefits. Given numerous lectures to individuals and groups, both layman and professionals, on estate planning and taxation, including the following:

- Asset Preservation - Central Texas Society of CPA's (1992 and 1994), McLennan County Family Practice Residence Program (1989, 1990, 1991, 1992, 1993, 1994, 1995, 1996, 1997, 1998), Fellowship Program (1993, 1994, 1995, 1998), Waco-McLennan County Bar Association (1992), McLennan County Medical Society (1994), PaineWebber Seminar Series, Corpus Christi (1994, 1995), PaineWebber Insurance Coordinator Regional Meeting (1994), PaineWebber Broker Series, Dallas, San Antonio (1996), Ft. Worth (1997), Waco Association of Life Underwriters (1996); Texas Society of Certified Public

Accounts (Houston Chapter) (1998);

- Estate Planning for the Elderly - Waco Estate Planning Council (1993, 1999), United Bank of Waco "Over 55" Club (1988); Providence Hospital Foundation (1998);
- Why Do I Need A Will? - Texas National Bank Trust Department Seminar (1994), Veteran's Administration Seminar (1992);
- The State of Your Estate - PaineWebber Summer Series for Women (1995, 1996, 1997, 1998), Hillcrest Hospital Hospice Training Programming (1996, 1997), Austin Avenue Methodist Church Seminar (1996), PaineWebber Seminar Series, McAllen (1996, 1997), Waco Business Women's Club (1996), Catholic Diocese (1996); PaineWebber Forum Series, Dallas, Texas (1998);
- The Rules of OSHA for Physicians Regarding Blood-Borne Pathogens - Hillcrest Hospital (1991, 1992);
- Criteria in Selecting an Attorney - KWTX Noon Hour Interview for Waco-McLennan County Young Lawyers Association (1990);
- What is the 1986 Tax Act All About? - First National Bank of Mexia (1987), Farmers and Merchants Bank of Mart (1987), Waco-McLennan County Bar Association (1987), Haley, Davis, Wren, Bristow & Rasner, P.C. Firm Seminar (1986);
- Do I need a Living Trust? - Hillcrest Hospital Hospice Training Programming (1995), First United Methodist Church Senior's Seminar (1995);
- Advanced Estate Planning Techniques for the 90's - Central Texas Society of CPA's (1995), PaineWebber PaceSetters Series, Dallas (1997); PaineWebber Seminar, Waco (1999);
- Tax Treatment of Qualified Accelerated Death Benefits Under Life Insurance Contracts - PaineWebber Branch Manager/Insurance Coordinator Regional Meeting, Beaver Creek Colorado, (1996);
- Why Haven't You Formed Your Family Limited Partnership - Central Texas Society of CPA's (1997), Baylor University Entrepreneur Program Morning Series (1998);
- Practical Legal Considerations to be Considered by New Physicians - McLennan County Family Practice Residence Program (1989, 1990, 1991, 1992, 1993, 1994, 1995, 1996, 1997, 1998);
- 1997 Taxpayer Act - Relief or Grief? - PaineWebber Insurance Training Seminar, Austin (1997);
- Taxpayer "Hoax" Act of 1997 - PaineWebber Seminar, Ft. Worth (1997); McLennan County Medical Society (1997);
- "Beneficiary Designations and Beyond" - Waco Estate Planning Council (1997); PaineWebber Seminar, Dallas (1999); PaineWebber Pace Setters Seminar, Houston (2000);
- "Estate Planning Strategies Using Life Insurance" - Providence Hospital Foundation (1999); Midland College Foundation, Inc. and Midland Memorial Foundation Seminar (1999);
- "Protecting Your Family Business with a Buy/Sell Agreement" – Texas A&M Family & Owner-Managed Business Program (1999).

Personal:

Danny is very active in local community affairs. He and his wife, Laura, have three young children, Drew, Grayson and Caroline.

To Contact Daniel A. Palmer, Please Click Here

Haley & Davis, P.C.
Bank One Plaza, Suite 600
510 North Valley Mills St.
Waco, TX. 76710

John McNair

Education:

- Arkansas State University, B.S. in Business - 1978
- University of Arkansas, Fayetteville, J.D. - 1981
- Southern Methodist University, L.L.M. (Tax Law) - 1982

Professional:

- Began private practice of law in Texas in 1983, concentrating in the fields of estate planning and probate and taxation.
- Certified Public Accountant, Texas- 1989
- Board Certified in Estate Planning and Probate by the Texas Board of Legal Specialization - 1990
- Board Certified in Tax Law by the Texas Board of Legal Specialization - 1994
- Speaker for numerous professional organizations including Texas Society of CPA's

To Contact John McNair, Please Click Here

Barnett & McNair, P.C.
5956 Sherry Lane, Suite 600
Dallas, TX. 75225

Kevin Shay

Profile:

Kevin P. Shay is a lawyer in San Antonio, Texas, whose professional concentration is working with individuals and small business owners throughout South and Central Texas to accomplish the planning for the protection and distribution of their estates. Mr. Shay believes that proper planning includes structuring for the protection of a client's assets from creditors and minimizing taxes where possible, and providing for the management of his client's financial affairs in the event they become incapacitated. Mr. Shay helps his clients achieve their goals for the distribution of their estates, and businesses, to whom they want, when they want, in the way want and save all the tax dollars, court costs, and professional fees possible. Mr. Shay has been providing his clients with estate, Business and tax planning services since graduating from Law School in 1979.

Education:

Mr. Shay received his B.B.A. from West Texas State University in 1977 and received his J.D. degree from the University of Iowa College of Law. Mr. Shay is also a CPA since 1978 and a member of the State Bar of Texas, the U.S. Tax Court Bar, the U.S. Supreme Court Bar and the American Bar Association. Mr. Shay is Board Certified in Estate Planning and Probate Law by the Texas Board of Legal Specialization.

Services:

Mr. Shay's services include: Design and Preparation of Wills and Trusts; Probate; Asset Protection Conferences; Estate Planning with Family Limited Partnerships; Retirement and Post-Retirement Planning Conferences; Design and Preparation of Executive Compensation Plans; Design and Preparation of Business Buy-Sell Agreements; Business, Tax & Estate Planning for closely held and Family Owned Businesses.

Personal:

Mr. Shay spends his time away from work involved in governing boards of his community, reading, golfing and projects around the house with his wife, Susan. He and his wife have two daughters, the eldest graduated from Mount Holyoke College and the youngest is attending the University of Texas at San Antonio to obtain a bachelor's and master's degree in accounting.

To Contact Kevin P. Shay, Please Click Here

Kevin P. Shay
Independence Plaza II
14350 Northbrook Drive, Suite 220
San Antonio, TX. 78232-5011

David Crowson

Attorney's Specialities:

David Crowson specializes in the area of estate planning and probate law, including estate tax planning for individuals and the business enterprises they own or control.

He also practices a great deal in the area of general corporate and real estate law. Areas in which he has rendered advice include:

- Preparation of wills and trusts to obtain maximum estate tax and inheritance tax advantage, including the use of unified credit shelter trusts and marital deductions trusts.
- Preparation of trusts, both living and testamentary, which include generation skipping transfer provisions.
- Preparation of private annuities.
- Preparation of irrevocable life insurance trusts, split dollar insurance agreements, deferred compensations agreements and other arrangements utilizing life insurance.
- Preparation of stockholders and partnership agreements, including buy/sell agreements.
- Preparation of family limited partnerships to accomplish the orderly transfer of interests in a closely held business enterprise.
- Assistance in negotiating and structuring transactions.

Attorney's Background:

Mr. Crowson has over 19 years of legal experience. He received his Juris Doctor degree from Baylor University in 1979 after having also received a Bachelor of Business Administration degree from Baylor University in 1976. He was licensed as a certified public accountant in 1982 and has spent his entire career practicing law in Longview, Texas. He advises clients on and implements sophisticated estate planning transactions such as family limited partnerships employing valuation discounts, qualified personal residence trusts, and the use of limited liability companies. He is also an adjunct professor of Business Law at LeTourneau University in Longview, Texas.

Firm's Specialties:

The backbone of Coghlan, Crowson, Fitzpatrick, Westbrook & Worthington, LLP has been energy law, both oil and gas law as well as coal and lignite law. In addition to the estate planning and probate practice, the firm has an active litigation practice. The firm also is involved in real estate and oil and gas transactions.

Types of Clients:

The clientele of Coghlan, Crowson, Fitzpatrick, Westbrook & Worthington, LLP includes numerous oil and gas companies and their executive officers. The firm also represents many other closely held enterprises, individuals who have recently sold their businesses, oil and gas investors, real estate investors, physicians, other professionals, and highly compensated executives.

To Contact David L. Crowson, Please Click Here

Coghlan, Crowson, Fitzpatrick, Westbrook & Worthington, LLP
1127 Judson Road
Energy Center, Suite 211
Longview, TX. 75606

Richard Marshall

Biographical Profile:

Richard Marshall is a veteran trial lawyer and a Certified Senior Advisor. His focus is upon the legal problems of senior citizens, both in litigation and in counseling. He has recovered substantial awards and settlements in medical malpractice and nursing home neglect and abuse claims.

His firm provides full representation at all levels of litigation, both individually and through a network of associated counsel throughout Texas.

Richard Marshall also provides legal counsel for senior clients in financial planning, retirement planning, estate planning and long term care planning. He assists clients in drafting wills, trusts, powers of attorney, directives to health care providers, guardian designations, burial instructions, and other planning documents.

He also represents clients in Probate Court in estate administrations, will probates, guardianships, and will contest litigation.

To Contact Richard T. Marshall, Please Click Here

Richard T. Marshall, P.C.
5959 Gateway Blvd. West, Suite 250
El Paso, TX 79925-3316

Samuel D. Griffin, Jr.

 Education:

- J.D., University of Houston, 1973
- B.S., Stephen F. Austin State University, 1970

Professional Activities:

- Sole practitioner concentrating in tax law, wills, trusts, estates, real estate, timber and business organizations

Admitted to practice by:

- Supreme Court of the United States of America
- U.S. Court of Appeals for the 5th Circuit
  U.S. Tax Court
- U.S. District Court, Eastern and Northern Districts of Texas
- Supreme Court of Texas

Other:

- Board Certified Specialist in: Residential Real Estate Law and Estate Planning & Probate Law, Tx. Bd. of Legal Specialization
- Instructor, Angelina College, Real Estate and Estate Planning, 1975 – present
- President, Pineywoods Chapter, Texas Association of Business & Chambers of Commerce, 1996 & 1997
- Member, National Academy of Elder Law Attorneys, 1996 – present
- Member, Texas Chapter, NAELA, 1996 - present

Law-Realted Presentations/Publications:

Speaker at numerous seminars for estate planning, real estate and business topics including:

- Speaker for the 1st Annual Forest Profitability Workshop, Estate Planning, September 2000, sponsored by the Arthur Temple College of Forestry at Stephen F. Austin State University, Nacogdoches, Texas.
- Speaker for the Texas Association of Business & Chambers of Commerce, Pineywoods Chapter, Concluding the Employment Relationship, 1995
- Speaker for 1st Annual Tyler Employment Relations Conference, Individual Supervisor and Manager Liability, April 1996, sponsored by the Texas Association of Business & Chambers of Commerce, Tyler Chapter, The Tyler Area Chamber of Commerce, and The Law Firm of Potter, Minton, Roberts, Davis & Jones, P.C.
- Speaker on Estate Planning, Seminar for Certified Public Accountants, May 1996, sponsored by Edward D. Jones Investments.
- Speaker on Estate Planning, Seminar for Certified Public Accountants, 1995, sponsored by Merrill-Lynch.

To Contact Samuel D. Griffin, Jr., Please Click Here

Samuel D. Griffin, Jr., Attorney At Law
PO Box 1965
Lufkin, Texas 75902-1965

Stephen A. Mendel

Profile:

Stephen A. Mendel is a member of the American Academy of Estate Planning Attorneys, a national organization that serves the needs of legal professionals whose practices focus on estate planning and asset protection.

The Academy fosters excellence among its members and helps them deliver the highest possible service to their clients. Stephen A. Mendel provides a broad spectrum of strategies and planning tools that can accomplish very diverse goals.

Education:

Mr. Mendel is a graduate of the School of Architecture at the University of Texas at Austin. He graduated with high honors and received recognition as a College Scholar. After practicing as an architect for several years, he attended South Texas College of Law, where he received his Juris Doctor, graduating summa cum laude. While there, he served as Executive Editor of the Law Journal and received substantial recognition for his academic and literary achievements.

Mr. Mendel was admitted to the Texas Bar in 1987, and is a member of the Houston Bar Association. Mr. Mendel also served two years as a briefing attorney for a U. S. District Court judge, and is a former associate of a nationally recognized law firm.

Services:

Mr. Mendel is an attorney who focuses a substantial part of his practice on estate planning. Mr. Mendel's guiding principle is to provide his clients with quality legal services tailored to each client's specific needs and goals.

Mr. Mendel has been providing quality estate planning for Houston and surrounding area clients for many years. His firm helps numerous people who are concerned about protecting their families from the devastating legal effects of disability and death. The aim of the firm is to help you accomplish your estate planning goals and to take the mystery out of the planning process.

Specific services include, but are not necessarily limited to, design and preparation of wills & trusts, asset protection, use of family limited partnerships as part of the planning process, buy-sell agreements, business counseling, and succession of closely held, family owned businesses.

Personal:

Steve and his family live in Houston, Texas. In his spare time, Steve enjoys coaching youth basketball. He also enjoys cycling, tennis, golf, water skiing, and snow skiing.

To Contact Stephen A. Mendel, Please Click Here

Mendel & Gammell, P.C.
1155 Dairy Ashford, Suite 104
Houston, TX. 77079

Home