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Michael S. Williams

Partner

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Mike Williams is a partner in the Tax and Wealth Management Department. Mike concentrates his practice in the field of wealth preservation and planning including the areas of complex estate and business succession planning, estate and trust administration, income tax planning for trusts and estates, private foundation planning, and marital agreements.

In addition to drafting wills, revocable trusts, powers of attorney, and living wills, Mike has expertise in drafting generation-skipping transfer tax exempt dynasty trusts, intentionally defective grantor trusts, insurance trusts, charitable remainder trusts, Crummey trusts, and special purpose trusts. Mike's expertise in income tax planning for trusts and estates encompasses planning for large closely-held business interests, net investment income tax issues, and multi-state tax issues.

Mike also assists clients in all aspects of setting up and administering private foundations to help clients further their charitable aims. In addition to drafting private foundation formation documents, Mike prepares applications for recognition of exemption from taxation from the Internal Revenue Service and provides advice and assistance on private foundation excise and unrelated business income tax issues.

Community and Pro Bono

- Mike is a frequent volunteer for the Wills For Heroes program where he devotes his time to preparing wills, powers of attorney, and living wills and durable health care powers of attorney for first responders and their families. Mike also provides expertise in the areas of estate planning, probate, estate and trust administration, and federal, state, and local taxation to low-income senior citizens as a volunteer attorney for the SeniorLAW Center Helpline.

Education

- New York University School of Law, LL.M., Taxation, 2013
- Temple University Beasley School of Law, J.D., *cum laude*, 2012
- University of Florida, B.A., Economics, 2007

Bar Admissions

- New Jersey, 2012
- Pennsylvania, 2012
- Florida, 2017

Professional Affiliations

- American College of Trusts and Estates Counsel, Mid-Atlantic Fellows Institute, 2019-2020
- Advisory Committee on Decedents' Estates Laws to Pennsylvania Joint State Government Committee, Research Consultant
- Philadelphia Bar Association, Probate and Trust Law Section, member
- Pennsylvania Bar Association, member
- American Bar Association, Section of Taxation, member

Other Distinctions

- *Temple Political and Civil Rights Law Review*, Senior Production Editor
- Rubin Public Interest Law Honor Society, Associate

Practices

- Tax
- Tax and Wealth Management
- Trusts and Estates

Industries

- Nonprofit