

#### Practice Areas

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- Family Office
- Estate Planning & Administration
- Tax
- Tax Planning

#### • Education

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- University of Texas School of Law, J.D., cum laude, 2005
- University of Texas at Austin, B.A., cum laude, 2001

#### Honors

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- Listed in Best Lawyers in America, 2018-present
- Life Fellow, Texas Bar Foundation
- Texas Super Lawyer, 2019-present
- Chambers USA: America's Leading Lawyers for Business, 2019-present
- "Top Lawyer" by Houstonia Magazine, 2019-present
- 40 Under 40, Houston Business Journal, 2015
- Fellow of the Texas Bar Foundation, 2015
- "Top Lawyer" by H Magazine, 2012-2015

## Brett T. Berly

Shareholder  
Houston

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Brett Berly is a Shareholder in the Firm's Trusts & Estates section. He focuses his practice on the representation of high net-worth individuals and fiduciaries of trusts and estates with respect to estate planning, probate, estate and trust administration, closely-held business succession planning as well as probate and fiduciary litigation matters.

As a cancer survivor, Brett brings a unique perspective to his practice, drawing on his personal experience to help structure plans for clients that satisfy both their personal and financial goals and objectives.

#### Seminars & Presentations

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- What just happened and what do I do now – Transfer planning ideas in uncertain times and how to report them (2021)
- Storm preppers: estate planning style (2020)
- When parting isn't sorrow: A discussion of disclaimers in estate planning (2019)
- Simplicity – The estate planner's white whale: Estate planning for the (currently) Non-taxable estate (2018)
- The heart of darkness: A journey into the GST Jungle (2017)
- In God we trust; All others must pay cash: Best practices for intra family loans (2017)
- The proposed §2704 regulations: Is this Grinch going to steal your Christmas ? (2016)
- The family game of thrones: A Planner's guide to drafting effective business succession plans (2015)
- To Love, Honor and maintain separate property: an estate planner's guide to protecting a spouse's property rights (2014)
- You can't take it with you... but your spouse can!: How portability works and what it means for you and your clients (2014)
- The rollercoaster has finally stopped!: Estate planning in 2013 and beyond (2013)

- Up-and-Coming 100: Texas Rising Stars, 2017- 2019
- Rising Star, Estate Planning & Administration, 2012, 2014-2019
- Marvin Key Collie Endowed Presidential Scholar in Tax Law, 2004-2005
- Research Assistant to the distinguished Professor Stanley M. Johanson, 2004-2005

#### Bar Admissions

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- Texas
- Board Certified Estate Planning and Probate Law, Texas Board of Legal Specialization

### **Brett T. Berly, *Continued***

- The 123s of GST what every practitioner should know about the generation-skipping transfer tax (2012)
- Focusing on what matters: Changing laws, family dynamics, and how they impact a successful estate plan (2012)
- The full monty on closely held business planning: Creating a plan that covers all angles (2011)
- Cross border tax issues (2011)
- The tax that flew over the cuckoo's nest – sorting through the insanity that is the federal estate tax (2010)
- Planning pitfalls and possibilities with retirement account beneficiary designations (2010)
- Is it time to trust your IRA beneficiary designation? A discussion of the issues related to designating a trust as the beneficiary of your retirement account (2009)
- An estate planning potluck! A discussion of legislative developments, recent FLP cases, retirement account planning strategies and alternate valuation issues (2009)
- So, you live in MONACO? Asset protection planning for the rest of us (2008)
- Procrastination – How to guarantee adverse tax consequences for retirement assets at death (2007)
- Desperate clients: A selection of estate, gift and Income tax issues for the residents of wisteria lane (2007)
- What is it worth? An overview of valuation Issues, applicable statutes of limitation and accuracy related penalties impacting estate and gift returns (2006)

#### Professional and Charitable Affiliations

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- Camp For All, Member of the Board of Directors and Past Chairman of the Young Professionals Board of Directors
- Houston Estate and Financial Forum, Director
- Texas Board of Legal Specialization, Exam Commission Member - Estate Planning and Probate Law
- Texas Bar CLE, Estate Planning and Probate Intermediate Course Planning Committee Member, 2016, 2017
- American Law Institute CLE Estate Planning, Law Advisory Panel Member, 2016 - Present
- Texas Young Lawyers Association
- American Bar Association, Section of Real Property, Probate and Trust

**Brett T. Berly,** *Continued*

- State Bar of Texas, Real Estate, Probate and Trusts Section
- Houston Bar Association, Trusts and Estates Section
- Adopt an Angel Program, Firm Liaison, 2009 - Present

