OBER | KALER
Attorneys at Law

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Bar Admissions
Maryland

Court Admissions
Court of Appeals of Maryland

Education
University of Virginia School of Law (J.D., 1990)

Syracuse University (B.A., *magna cum laude*, 1985)
- Honors Program
- Phi Beta Kappa

JOHN P. EDGAR

Experience

Jack Edgar is a principal in Ober|Kaler's Estates and Trusts Group. He advises high net worth clients in estate and trust planning and administration, as well as related tax and business succession planning issues.

Jack's practice includes all aspects of trusts and estates law, including estate planning; advising clients on estate, gift, GST and income tax issues; drafting wills, trusts and other sophisticated planning vehicles; advising trustees and personal representatives; preparing tax returns; administering estates; planning for retirement assets; planning for business succession and other issues for closely held businesses; charitable gift planning; fiduciary litigation and related areas.

Jack is a former managing director of the Trust Advisory Group at Legg Mason Investment Counsel & Trust Company, where he supervised the corporate trustee, wealth advisory and custody functions of the organization.

He is a frequent author and speaker on estate and trust planning matters.

Professional Memberships

- American Bar Association
  - Section of Real Property, Probate and Trust
  - Section of Taxation
- American College of Trust and Estate Counsel
  - Fellow, 2003-present
- Baltimore Estate Planning Council
  - Board of Directors, 2005-present
  - President, 2013-2014
- Maryland State Bar Association
  - Estate and Trust Law Section
    - Chair, 2008-2009
    - Program Chair, 1999-2008
  - Estate and Gift Tax Study Group

Honoraries

- Listed in *The Best Lawyers in America*, Trusts & Estates Category (Woodward/White, Inc.), 2014
- Listed in *Maryland Super Lawyers,* Estate Planning & Probate, 2008-2013
- AV Rated, Martindale-Hubbell

Professional Background

- Managing Director, Trust Advisory Group, Legg Mason Investment Counsel & Trust Company, N.A.
- Partner, Venable, LLP

Publications & Presentations

- Presenter, "Planning for the Married Couple: Making Sure the Bypass Trust is Funded at the First Death," MACPA Chesapeake Tax Conference, 2009
- Presenter, "GRITs; GRATs; Qualified Personal Residence Trusts; Generation Skipping Trusts; Generation-Skipping Transfer Tax, " Using & Drafting Trusts in Estate Planning, MICPEL, 2009; 2007; 2005; 2003
- Presenter, "Estate Planning in a Low Interest Rate Environment," Garrett Financial Planning Network, 2008
- Presenter, "2008 Maryland Legislation Affecting Estates and Trusts Practice," MICPEL Advanced Estate Planning Institute; Maryland State Bar Association Estate and Gift Tax Study Group; Frederick Estate Planning Council, 2008
- Author, "IRS Provides Guidance on Return Preparer Penalties," *Estate Planning Report,* 2008
- Author, "2008 Tax Law Changes," *Estate Planning Report,* 2008
- Author, "IRS Proposes Regulations on Miscellaneous Itemized Deductions for Trusts and Estates," *Estate Planning Report,* 2007
- Presenter, "Uniform Trust Code Highlights," Estate and Gift Tax Study Group, Maryland State Bar Association, 2007
- Author, "The New IRA Charitable Rollover," *Vantage Point,* 2006
- Author, "A Matter of Trust: Using Trusts to Preserve, Protect and Pass On Assets," *Vantage Point,* 2006
- Author, "MICPEL Advanced Estate Planning Institute," *Estate and Trust Law Section Newsletter*, 2005
- Author, "Estate Planning While You Wait," *Vantage Point,* 2005