Edwin G. Fee, Jr.

PARTNER

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BIOGRAPHY

Mr. Fee, a fellow of the American College of Trust and Estate Counsel, focuses his practice on Trust and Estate Taxation, Trusts, Wills and Estate Planning and Business Succession Planning. Through his more than twenty years of practice, clients served include individuals with assets worth in excess of $70 million, including family-owned auto dealerships, hundreds of original works of art and waterfront and developable real estate.

RECOGNITIONS

- Recognized by *Chambers and Partners High Net Worth Guide* in Maryland, Private Wealth Law - Band 1, "Notable Practitioner" (2016 - present)
- Listed in *Best Lawyers in America*: in the field of Trusts and Estates (2008-present), including 2014, 2015, 2019 Baltimore Trusts and Estates "Lawyer of the Year"
- Listed in *Maryland Super Lawyers* (2007-present), including Top 100 Maryland Super Lawyers (2012-2013) and Top 50 Maryland Super Lawyers (2010-2011, 2007)
- Pro Bono Service Appreciation Awards: The Arc of Baltimore (2005-2008)
- Pro Bono Award: Pro Bono Resource Center of Maryland (2005)

PRACTICES & INDUSTRIES

Trust and Estate Taxation

Trusts, Wills and Estate Planning

Business Succession Planning

EDUCATION

New York University School of Law, 1991, LL.M., Taxation

New York University School of Law, 1990, J.D.

Johns Hopkins University, 1987, B.A.

ADMISSIONS

Maryland

District of Columbia

New Jersey

New York

U.S. Tax Court

- Ten Year Volunteer Award: Maryland Volunteer Lawyers Service (2005)
- Annual Pro Bono Award: Baltimore County Bar Assoc. (2005)
- Trailblazer Award: Legal Aid Bureau Equal Justice Council (2005)
- Thomas Ferciot Memorial Award: The Arc of Baltimore (2004)
- Edward F. Shea, Jr. Professionalism Award: Maryland Bar Foundation (2001)
- Presidential Best Section Award for a Project to Benefit the Public: Maryland State Bar Assoc. (as principal author of "Living Trusts: Get the Facts!") (2000)

MEMBERSHIPS & ACTIVITIES

Professional / Community Activities

- American College of Trust and Estate Counsel (ACTEC): Fellow (elected 2006)
- Kennedy Krieger Institute Planned Giving Advisory Council (2017-present)
- Baltimore Symphony Orchestra Planned Giving Advisory Council (2015-present)
- The Associated Planned Giving Roundtable: Program Committee (2014-present)
- Baltimore County Local Pro Bono Comm. (2007- present)
- Baltimore Estate Planning Council: Board of Directors (2007-2013)
- Chesapeake Planned Giving Council: Board of Directors (2012-2017)
- University of Baltimore School of Law: Adjunct Professor, Graduate Tax Program (2009)
- Whiteford, Taylor & Preston: Pro Bono Coordinator (2007-present)

Bar Association Activities

- Maryland State Bar Assoc.: Board of Governors (2011-2013; 2007-2009; 2003-2005; 1999-2001); Estate & Trust Law Section Council: Chair (2006-2007); Section Council (2000-2010)
- Baltimore County Bar Assoc.: Estates & Trusts Comm.; Past Chair, Advocate Comm.; Past Chair, Constitution & Bylaws Comm.; Past Chair, Pro Bono Comm.; Past Chair, Young Lawyers Comm.
- Bar Assoc. of Baltimore City: Executive Council (1998-2003); Past Chair, Continuing Legal Education Comm.; Past Chair, Legislation Comm.; Past Chair, Young Lawyers' Division
- Maryland Bar Foundation: Life Fellow
- Baltimore Bar Foundation: Life Fellow; Past Trustee

TRUSTS, WILLS AND ESTATE PLANNING AND TAXATION

- Estate planning for individual with assets worth in excess of $70 million, including several family-owned auto dealerships
- Administration of estate with assets worth in excess of $50 million
- Administration of estate with assets worth in excess of $30 million, including hundreds of original works of art by a major 20th century American artist, for which there was a "blockage" valuation discount
- Administration of estate with assets worth in excess of $20 million, including water-front real estate on the Chesapeake Bay
- Administration of multi-million dollar estate with assets including an interest in a family limited partnership, for which there were valuation discounts for minority interest and lack of marketability
- Administration of multi-million dollar estate with assets including a several hundred acre parcel of developable real estate

PRO BONO

- Pro bono representation of low-income and disabled individuals through Maryland Volunteer Lawyers Service, ARC of Baltimore, and Legal Aid Bureau

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PRESENTATIONS & PUBLICATIONS

Speaker: “Where Will You Retire?,” The Prosperity Consulting Group (Feb. 27, 2018)

Speaker: “Wills, Probate and Planning,” Osher Life Long Learning Institute at Towson University (Feb. 19, 2018)

Speaker: “Estate Planning with Retirement Benefits,” Baltimore County Bar Assoc. Estates & Trusts Comm. (Dec. 6, 2016)

Speaker: “Estate Planning and Asset Protection,” Greater Baltimore Medical Center (Oct. 29, 2015)

Speaker: “Federal and Maryland Estate Tax Planning,” Wells Fargo Advisors (May 19, 2015)

Speaker: “The Maryland Estate Tax Fix: Why Clients Still Need Us,” Bar Assoc. of Montgomery County Estate & Trust Law Section (Mar. 9, 2015); Baltimore County Bar Assoc. Estates & Trusts Comm. (Dec. 11, 2014)

Speaker: “Practical Implications of the New Maryland Trust Act,” Baltimore County Bar Assoc. Estates & Trusts Comm. (Oct. 9, 2014)

Speaker: “Estate Planning,” Oppenheimer & Co. (Sept. 30, 2014; May 15, 2013)

Author: “’Permanent’ Federal Estate Tax,” Maryland State Bar Assoc. Bar Bulletin (Sept. 2013)

Speaker: “Key Strategies for Physicians’ Asset Protection and Estate Planning,” GBMC Foundation (June 26, 2013)

Speaker: “Federal Estate Tax Update,” Baltimore County Bar Assoc. Estates & Trusts Comm. (April 11, 2013)

Speaker: “Revocable Living Trusts,” Maryland State Bar Assoc. (Oct. 26, 2012)

Author: “The Annual Federal Estate Tax Change,” Maryland State Bar Assoc. Bar Bulletin (Sept. 2012)

Speaker: “The Prudent Investor: Managing Trust Assets,” Maryland State Bar Assoc. (April 10, 2012)

Author: “The Temporary Federal Estate Tax,” Maryland State Bar Assoc. Bar Bulletin (Sept. 2011)

Speaker: “Modified Carryover Basis Rules for 2010,” Maryland State Bar Assoc. Advanced Estate Planning Institute (May 13, 2011)

Speaker: “The 2010 Tax Act and Its Impact on Charitable Giving,” Chesapeake Planned Giving Council (March 23, 2011)

Author: “Carryover Basis in 2010,” Maryland State Bar Assoc. Bar Bulletin (Oct. 2010)

Speaker: “Estate Planning in Uncertain Times,” Maryland State Bar Assoc. Estate & Trust Law Section Annual Meeting (June 11, 2010)

Speaker: “Future of the Federal Transfer Taxes,” Maryland State Bar Assoc. Estate & Gift Tax Study Group (April 22, 2010)

Author: “Apportionment of Estate and Inheritance Taxes,” Maryland State Bar Assoc. Bar Bulletin (Nov. 2009)

Author: “Portability of the Federal Estate Tax Exemption,” Maryland Bar Journal (Sept./Oct. 2009)

Author: “Reducing Boomer Estate Taxes,” Maryland Bar Journal (Jan./Feb. 2009)

Author: “Predicting the Future of the Federal Estate Tax,” Maryland State Bar Assoc. Bar Bulletin (May 2008)

Speaker: “Using and Drafting Trusts in Estate Planning,” Maryland Institute for Continuing Professional Education of Lawyers (MICPEL) (June 22, 2007; June 24, 2005; June 20, 2003; June 29, 2001)

Author: “The Ever-Changing Maryland Estate Tax,” Maryland Bar Journal (Nov./Dec. 2006)

Author: “Maryland Estate Tax: Past, Present, and Future,” University of Baltimore Law Forum, Vol. 36, No. 2 (Spring 2006)

Author: “Death and Taxes,” Maryland State Bar Assoc. Bar Bulletin (Jan. 2006)

Author: “New Unimproved Maryland Estate Tax,” Maryland Bar Journal (Mar./Apr. 2005)

Author: “Maryland Estate Tax Increases,” Maryland State Bar Assoc. Bar Bulletin (Sept. 2004)

Author: “The Uncertainty of Death Taxes,” Maryland State Bar Assoc. Bar Bulletin (Feb. 2003)

Author: “Is the Death of the Death Tax Greatly Exaggerated?” Maryland State Bar Assoc. Bar Bulletin (Feb. 2002)

Principal Author: “Living Trusts: Get the Facts!” Maryland State Bar Assoc. (2000)

Author: “Electing to Treat a Revocable Trust as Part of the Estate,” Estate Planning (Mar./Apr. 1999)

Author: “Substituted Judgment: Estate and Medicaid Planning by Guardians,” Probate & Property (Jan./Feb. 1999)

Quoted in: “Legal Loophole Leaves Upset Heir at a Loss,” The Baltimore Sun (June 27, 1998)

Author: “New Disclaimer Regs. and Other Rules Affecting Jointly Owned Property,” Estate Planning (March/April 1998)

Quoted in: “To Trust or Not to Trust,” Wall Street Journal (Oct. 6, 1997)

Author: “Living Trusts: Debunking the Myths,” Practical Lawyer (June 1997)

Author: “Shooting Down Living Trusts,” American Bar Assoc. Journal (Mar. 1997)

List of other articles/speeches available upon request