



MORGAN AND DiSALVO, P.C.
attorneys at law

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PRACTICE PROFILE

Morgan & DiSalvo, P.C. has been selected by *U.S. News & World Report* and *Best Lawyers* as one of the Best Law Firms for Trusts and Estates Law in Georgia for every year since 2013.

PRACTICE FOCUS:

Practical and creative estate and tax planning to help individuals and families deal with the many changes that life brings. From wills, trusts, powers of attorney, and advance directives for health care, to the most sophisticated planning and problem solving, we are passionate about helping our clients and providing the highest level of service.

LORAINÉ M. DiSALVO

AREAS OF CONCENTRATION:

- Estate Planning
- Tax Planning
- Probate
- Estate and Trust Administration
- Charitable Gift Planning
- Business Exit/Succession Planning

EDUCATION:

- Emory University School of Law
J.D., with distinction, 1997
- Georgia State University
B.A., *cum laude*, in history, 1994

ADMITTED TO PRACTICE IN GEORGIA: 1997

HONORS & AWARDS:

- Martindale-Hubbell: Highest legal ability and ethical standards rating (AV - 4.8 out of 5.0)
- AVVO.com: rated Superb (10.0 out of 10.0)

- Selected for inclusion in Super Lawyers Georgia (2013 - 2024)
- Five Star Professional Wealth Advisor (2010 - 2022)
- AVVO.com Top Contributor (2014 - 2022)
- Georgia Trend Magazine's Legal Elite- Tax, Estate, and Trust Law (2016)

PROFESSIONAL AFFILIATIONS:

- Atlanta Bar Association
 - CLE Board of Trustees - Member at Large (June 2013 - May 2016)
 - Member (2005 - present)

- Atlanta Bar Association, Estate Planning & Probate Section
 - Immediate Past Chair (June 2013 - May 2014)
 - Chair (June 2012 - May 2013) - Section was selected as Small Section of the Year for this year
 - Vice-Chair/Chair Elect (June 2011 - May 2012)
 - Treasurer (June 2010 - May 2011)
 - Secretary (June 2009 - May 2010)
 - Member-at-large, Board of Directors (June 2007 - May 2009)
 - Editor-in-Chief for *The Mortmain*, the Section newsletter (June 2013 - present)
 - Contributing Editor for *The Mortmain*, the Section newsletter (December 2005 to May 2013)
 - Member (2005 - present)

- Atlanta Bar Association, Taxation Section, Member (2005 - present)

- Atlanta Bar Association, Small Firm/Solo Practitioner Section, Member (2005 - present)

- Atlanta Estate Planning Council, Member (September 2011 - present)

- Balseer Philanthropic Advisors Council Giving Circle, Member (2016, 2017, 2018, 2019)

- Collaborative Law Institute of Georgia
 - Member (2010 - 2016)

- International Academy of Collaborative Professionals
 - Member (2010 - 2016)

- Estate Planning Council of North Georgia
 - President (2024)
 - Vice President of Programs (2022 - 2023)
 - Board Member (2016 - 2021)
 - Member (2010 - present)
- Philanthropic Advisor Leadership Institute
 - Participating Class Member, Class of 2011

- ProWIN (the Professional Women's Information Network, Inc.)
 - Advisory Board member (2015 - 2022)
 - Board-Member-at-Large (2014)
 - Immediate Past President (2013)
 - President (2011 & 2012)
 - President-Elect (2010)
 - VP of Finance/Treasurer (2007 - 2009)
 - Member (2005 - present)
- Member, State Bar of Georgia (1997 - present)
- Member, American Bar Association (1994 - present)
- Member, Financial Planning Association (2001 - 2007)
- Member, Georgia Association for Women Lawyers (2005 - present)
 - Committee Star award (May 2011)
 - Co-founder and Host of North Fulton GAWL Neighborhood Networking Breakfast (April 2008 - April 2011)
- Member, Stonewall Bar Association (2005 - present)
- Member, North Fulton Bar Association (2005 - 2022)

PROFESSIONAL LECTURES:

- *Endless Summer? Planning to Keep the Vacation Home in the Family*; presented at the Estate Planning & Probate Section of the Atlanta Bar Association on August 8, 2018
- *Estate Planning's New Paradigm*; presented at the 2014 Estate Planning Conference of the Georgia Society of CPAs on August 1, 2014
- *Understanding the Basics of the Most Common Trusts and The Top 10 Estate Facts that ALL CPAs Must Know*; both presented at the 2014 Federal Tax Day Seminar of the American Woman's Society of Certified Public Accountants, Georgia Affiliate, on November 7, 2014

RICHARD M. MORGAN

AREAS OF CONCENTRATION:

- Estate Planning
- Tax Planning
- Estate and Trust Dispute Resolution
- Business Exit/Succession Planning
- Charitable Gift Planning

EDUCATION:

- Emory University School of Law
Master of Laws (LL.M.) in Taxation, 1992
- University of Georgia
J.D., *cum laude*, 1987
B.B.A., *cum laude* in accounting, 1984

ADMITTED TO PRACTICE IN GEORGIA: 1987

HONORS & AWARDS:

- Martindale-Hubbell: Highest legal ability and ethical standards rating (AV) (5.0 out of 5.0)
- Martindale-Hubbell: listed in Bar Register of Preeminent Lawyers
- AVVO.com: rated Superb (10.0 out of 10.0)
- Selected for inclusion in Super Lawyers Georgia (2013 - 2024)
- Five Star Professional (2009 - present)
- Best Lawyers in America - Atlanta Metro- Trusts and Estates Law (2013 - present)

PROFESSIONAL LEADERSHIP/AFFILIATIONS:

- The American College of Trust & Estate Counsel (ACTEC)
 - Fellow (2014-present)
- Estate Planning & Probate Section, Atlanta Bar Association
 - President (2001 - 2002)
- Taxation Section, State Bar of Georgia
 - President (1999 - 2000)
- Taxation Section, Atlanta Bar Association
 - President (1996 - 1997)
- Fiduciary Law Section, State Bar of Georgia
 - GA Trust Code Revision & Legislative Committees (2015 - present)

- Business Law Section, State Bar of Georgia
 - Partnership Committee (1997 - 2014)
- Balsemer Philanthropic Advisors Council Giving Circle (2016 - 2019)
- Estate Planning Council of North Georgia (f/k/a Cobb County Estate Planning Council, Inc.)
 - President (1997)
- Georgia Planned Giving Council
 - President (1998)
- Philanthropic Advisor Leadership Institute
 - Graduate, Inaugural Class of 2007
 - Member, Steering Committee (2008)
- North Atlanta Tax Council
 - Member, Board of Directors (1998 - 2002)
- Georgia State University Law School Tax Clinic
 - Member, Advisory Board (1997, 2000)
- Financial Planning Association
 - Member, Board of Directors (2002 - 2003)
 - Chair, Liaison with Allied Professionals Committee (2002 - 2003)
- Collaborative Law Institute of Georgia
 - Board of Directors, Member (2011)
 - Member (2010 - 2016)
- International Academy of Collaborative Professionals, Member (2010 - 2016)
- Atlanta Estate Planning Council, Member
- The Not-So-Young Fiduciary Lawyers Group, Member
- Georgia and Atlanta Bar Associations, Member

PROFESSIONAL LECTURES:

- Lecturer on estate planning, tax planning, charitable gift planning, and other tax related topics before numerous professional organizations including, among others, the State Bar of Georgia (ICLE), Atlanta Bar Estate Planning & Probate Section, North Atlanta Tax Council, Financial Planning Association, Georgia Planned Giving Council, various chapters of the Georgia

Society of CPAs, National Business Institute, Sterling Education Services, the Office of the Comptroller of the Currency, and the Estate Planning Council of North Georgia.

CIVIC LEADERSHIP/ACTIVITIES:

- Leadership North Fulton
 - Graduate, Class of 2007

- The Community Foundation For Greater Atlanta.
 - Member, Planned Giving Advisory Board (1998 - 2003)

- Jewish Family & Career Services
 - Secretary and Member of Executive Committee (2002 - 2004)
 - Member, Board of Directors (1999 - 2004)

- Jewish Federation of Greater Atlanta
 - Chair, Endowment Professional Advisory Committee (2002 - 2005)

- Endowment Committee, Metropolitan YMCA
 - Chairman, Technical Advisory Subcommittee (1996 - 1998)

- Congregation Dor Tamid
 - Trustee (2000 - 2002)

- American ORT
 - Member, Planned Giving Advisory Council (2000 - 2003)

- Cobb County Chamber of Commerce
 - CEO Roundtable (1989 - 1992)

ALLISON L. BYRD

AREAS OF CONCENTRATION:

- Estate Planning
- Probate
- Estate and Trust Administration
- Estate and Trust Dispute Resolution
- Mediation

EDUCATION:

- J.D., University of South Carolina, 1992
 - American Jurisprudence Award for Moot Court, 1991
 - Roy Webster Scholarship Recipient, 1989
- B.A. *cum laude* in Political Science, Augusta State University, 1989

ADMITTED TO PRACTICE IN GEORGIA: 1992

BAR MEMBERSHIPS AND PROFESSIONAL CERTIFICATIONS:

- Supreme Court of the United States (2001 - present)
- United States Court of Appeals, Eleventh Circuit (2001 - present)
- United States District Court for the Northern District of Georgia (2001 - present)
- Supreme Court of Georgia (1993 - present)
- Court of Appeals of Georgia (1993 - present)
- State Bar of Georgia (1992 - present)
- Registered Civil Mediator and Arbitrator (2013 - present)

PROFESSIONAL LEADERSHIP AND AFFILIATIONS:

- Atlanta Bar Association, Estate Planning & Probate Section (2013 - present)
 - Immediate Past Chair (2021-2022) (Designated “Small Section of the Year”)
 - Chair (2020 - 2021) (Designated “Small Section of the Year”)
 - Vice Chair/Chair Elect (2019 - 2020) (Designated “Small Section of the Year”)
 - Secretary (2018 - 2019)
 - Member-at-Large, Board of Directors (2017 - 2018)
 - Editorial Board Member and Contributing Editor for *The Mortmain*, the official newsletter of the Estate Planning & Probate Section of the Atlanta Bar Association (2014 - present)
 - Member (2013 - present)
- Atlanta Bar Association, Dispute Resolution Section, Member (2013 - present)
- Atlanta Bar Association, Elder Law Section, Member (2015 - 2022)

- Atlanta Estate Planning Council, Member (2022 - present)
- Balser Philanthropic Advisors Council Giving Circle, Member (2024)
- Estate Planning Council of North Georgia (2018 - present)
 - Vice President of Programs (2024)
 - Vice President of Membership (2023)
 - Board of Directors Member-at-Large (2022)
 - Member (2018 - present)
- Georgia Association for Women Lawyers, Member (2013 - present)
- National Association of Elder Law Attorneys, Member (2015 - 2017)
- Philanthropic Advisor Leadership Institute (2023 Graduating Class)

SPEAKING ENGAGEMENTS:

- “Basic Estate Planning Concepts for Financial Planners,” presented to financial planners at Edward D. Jones & Co., L.P. (d/b/a Edward Jones) in Roswell, Georgia on May 13, 2019.
- “Estate Planning for Creative Professionals,” presented to members of the Freelance Forum (independent marketing and creative professionals) in Atlanta, Georgia on October 1, 2015.

CIVIC LEADERSHIP AND VOLUNTEER ACTIVITIES:

- Fulton County Probate Information Clinic, Volunteer (2015 - present)
- DeKalb County Probate Information Clinic, Volunteer (2015 - present)
- Atlanta Legal Aid, Volunteer (2015)
- Coleman Ridge Homeowner’s Association, Treasurer (2013 - 2015)
- Atlanta Science Tavern, Inc., Secretary (2014 - 2015)
- Good Mews Animal Shelter, Volunteer (2017 - 2020)

PREVIOUS LEGAL PRACTICE AREAS:

- Appellate Practice
- Commercial Litigation
- Civil Insurance Litigation
- Criminal Prosecution and Defense
- Municipal Law