KIRTON | McCONKIE

GEOFF GERMANE (AEP)

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SHAREHOLDER

Geoff Germane is a member of the firm's Tax and Estate Planning practice section. His focus is on estate, tax, business, and asset protection planning. He advises individuals and business owners on legally sound strategies to protect their assets and reduce or eliminate taxes. He counsels clients on legacy planning to maximize intergenerational wealth and reduce family stress and tension.

Mr. Germae is certified as an Accredited Estate Planner® with the National Association of Estate Planners and Councils. Mr. Germane has also been selected by fellow Utah attorneys as Utah Legal Elite in the area of Estate Planning in 2016, 2018, and 2019.

EXPERIENCE

Represents numerous founders and principal owners of businesses in many industries with market values of up to several hundred million dollars.

Assists business owners with succession plans in and out of the family with delicate relationship and tax dynamics.

EDUCATION

Brigham Young University, J. Reuben Clark Law School, JD, *cum laude*, National Order of the Barristers

Brigham Young University, Marriott School of Management, BS, Accounting

ADMISSIONS & AFFILIATIONS

Bar Admissions: Utah, California

Affiliations: Utah Bar, Estate Planning Section (Chairperson, vice chair, treasurer, and program chair); Tax Section; Nonprofit Section; Business Law Section

Utah Valley University Gift Planning Advisory Board

Board Member, Utah Valley Estate Planning Council, President (2012)

President, BYU Management Society (2016-2017)

Salt Lake Estate Planning Council

Adjunct Professor in Legal Studies Department at Utah Valley University in Estate Planning & Business

Adjunct Professor in Business Law at BYU Marriott School

American Bar Association

San Diego County Bar Association

J. Reuben Clark Law Society

PUBLICATIONS & PRESENTATIONS

Publications

Will Essentials: "What happens to your tangible and digital "stuff" when you die?", Family Search, 2017

The Art of Avoiding Utah Income Tax (co-author), Leimberg Information Services, 2017

3 Ways To Give To Charity At Tax Year's End, (quoted) Forbes, 2016

Your dead ex-spouse's debt can become your problem, CNN Money interview, 2014

Utah DAPT Primer, Utah Business Magazine, 2013

Solutions to Disenchantment With Family Entities, Estate Planning, April 2013

Help! I'm Stuck in My FLP!, The Wealth Counsel Quarterly, 2012

PRACTICE AREAS

TAX & ESTATE PLANNING

BUSINESS FORMATION, STRUCTURE AND EXIT STRATEGIES

INDUSTRIES

NONPROFIT ORGANIZATIONS

LANGUAGES

ITALIAN

PORTUGUESE

SPANISH

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PUBLICATIONS & PRESENTATIONS

Program-Related Investments and L3Cs: An Underutilized Tool for Private Foundations, and the Key to the Tool-shed?

Beyond Plain Vanilla: Unique Tax and Financial Planning Opportunities with Charitable Trusts

Presentations

What to Expect While You're Expecting… Tax Reform, UVU Business and Economic Forum, 2017

Keeping "Success" in Business Succession: Key Considerations in Planning for the Business Owner, 2014 – 2017

Your Closely Held Business Interest is Worth More than it's Worth (and other IRS truths from the 2704 Regulations), Utah Valley Estate Planning Council, 2016

The Three-Edged Sword of Discretion: Designing Discretionary Distribution Standards to Protect the Settlor, the Beneficiary, and the Trustee, Lorman National Webinar, 2014, 2016

Income Tax Basis Planning,NAIFA, 2015, 2016

Potpourri of Tax, Liability, and Risk Reduction Strategies for Business Owners, UVU Business and Economic Forum, 2016

Utah LLC Act Update, Squire and Co, 2015

Unique Tax and Financial Planning Opportunities with Charitable Trusts, Hawkins Cloward and Simister, 2014

Iron Suit or Iron Cage: What You Need to Know to Select the Right Business Entity, UVU Business and Economic Forum, 2014

Why a Client Calls: Primary Legal Issues Faced by Nonprofits, and Where a Good Nonprofit Attorney can Provide the Greatest Value, Utah Nonprofits Association, 2013

Assorted Planning Strategies for Common Situations, Squire and Co, 2013

Utah Domestic Asset Protection Trusts: Overview, Requirements, Uses, 2013

Portability: What You Need to Know About the "Game Changer," UVU Business and Economic Forum, 2013

Emerging Estate and Gift Tax Issues (Fear Not the Claw Back, but Do Beware the Loss of Valuation Discounts), UVU Business and Economic Forum, 2012

The Not-So-Imposing Clawback, UVU Business and Economic Forum, 2012 The End of Valuation Discounts? UVU Business and Economic Forum, 2012

Family Limited Partnerships: Solutions to Growing Problems, Utah Valley Estate Planning Council Spring Forum, 2012

Program Related Investments and L3Cs: Underutilized tools for Private Foundations and the Key to the Tool Shed?, Utah Bar, Tax and Nonprofit Sections, 2011