Dinsmore

Wayne F. Wilson

Partner
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As chair of the Tax, Benefits, and Wealth Planning practice group, Wayne focuses his practice on complex trust and estate matters, transactional matters and strategic business advice. His engaging approach and ability to build relationships with clients ensures their objectives are met efficiently and practically.

Understanding that effective estate planning requires the ability to balance tax and estate law with business savvy, Wayne works shoulder-to-shoulder with clients to analyze the short and long-term impacts of their decisions. As a former trust officer, he has developed a niche advising individual and corporate trustees on trust administration matters, including questions of interpretation, court actions to reform or modify trusts and disputes with beneficiaries. He also has extensive experience in handling complicated estate administration matters, ranging from large insolvent estates to closely-held business interests to estate tax exposure matters, including interfacing with the IRS and advising on audits.

In addition to his clients, he routinely works with their advisers, including personal accountants and investment advisers, coordinating their efforts and ensuring that the client's interests are protected at every turn. Just as importantly, he also is adept at managing the sensitive family dynamics that often come into play during estate planning and administration matters, working carefully to tailor his approach to fit each unique situation.

In building lasting relationships with clients, Wayne also leverages his background in tax and finance to provide general counsel to clients on a wide variety of business matters. He has extensive experience in the business arena, where he advises closely held businesses, community banks and physician practice groups on strategic decisions, mergers and acquisitions and contract negotiation.

Services

- Private Client & Family Wealth Planning
- Tax Planning
- Corporate & Transactional
- Corporate Taxation

Education

- Brandeis School of Law at the University of Louisville (J.D., 1997)
- Transylvania University (B.A., 1993)

Bar Admissions

- Kentucky

Affiliations/Memberships

- University of Kentucky Southeast Estate Planning Institute, faculty
- American College of Trusts and Estates Counsel, fellow
- Louisville Bar Association, Trusts and Estates and Business Law Sections
- Kentucky Bar Association

Distinctions

- Peer Review Rated AV in *Martindale-Hubbell*
- Kentucky *Super Lawyers*®
    - For Estate & Probate (2021)
- Top Estate Planning Attorney in *Louisville Magazine*
- "Top Lawyers" list by *Louisville Magazine* (2013, 2016)
- Best Lawyers®
    - Litigation - Trusts and Estates (2022)

Experience

Successfully Defended Bank against Claims of Breach of Fiduciary Duty
We represented our client, a large regional bank, following a claim of breach of fiduciary duty in connection with a large family trust. We successfully had those claims dismissed through a dispositive motion, a decision which was unanimously upheld on appeal.

Publications

June 29, 2022
Avoiding Liability in Trust Terminations Following Estate of Worrall

May 10, 2022
Kentucky Businesses Impacted by Sweeping Tax Reform

July 22, 2020

Kentucky Community Property Trust Act Provides Significant Basis Planning Opportunities for Married Couples

January/February 2016

Probate Law: Journal of Ohio - Interacting with Co-Trustees and Other Third Party Decision Makers: Planning and Administration Perspectives