



## Erin M. Matis

### SENIOR COUNSEL

DENVER, CO

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### OVERVIEW

Erin has more than a decade of experience assisting clients with trust and estate planning, wealth preservation planning, business succession planning and charitable planning. She also advises trustees on their fiduciary duties.

Erin concentrates her practice on estate and gift tax planning, business succession planning, probate and trust administration, and charitable planning. She also represents clients in probate and trust litigation, and advises individual and corporate fiduciaries on their duties.

To ensure clients' objectives and needs are properly addressed, Erin works closely with clients and their accountants, financial planners and other advisers to formulate customized estate plans. With an advanced degree in taxation, Erin designs and implements sophisticated wealth transfer plans for closely held business owners and high net-worth individuals.

Erin also represents trustees, executors and beneficiaries when fiduciary claims or issues with taxing authorities arise. After serving as in-house counsel to a trust company, Erin is uniquely qualified to counsel fiduciaries on compliance matters and other challenges that may arise within the fiduciary relationship.

### Industry

Financial Services & Capital Markets

### Services

Cannabis

Litigation & Alternative Dispute Resolution

Nonprofit Organizations & Religious Institutions

Private Wealth

Tax

Trust, Estate, & Fiduciary Litigation

## Experience

### **WEALTH, TAX, TRUST AND ESTATE PLANNING AND ADMINISTRATION**

- Prepared wills and trust agreements—including revocable, life insurance, grantor-retained annuity, intentionally defective grantor, qualified personal residence, asset protection, special needs, charitable remainder, and charitable lead trusts—and private foundations (both trusts and corporations).
- Negotiated and drafted various types of marital and co-habitation agreements for clients.
- Assisted cannabis business owners with basic and advanced estate planning.

### **ESTATE AND TRUST ADMINISTRATION/PROBATE**

- Counseled professional and nonprofessional trust and estate administrators on fiduciary duties.
- Assisted with probate and trust administration and accountings.
- Advised fiduciaries on establishing best practices to minimize risks, avoid litigation and effectively settle disputes without court intervention.

### **BUSINESS/CORPORATE PLANNING**

- Guided clients in forming entities, including limited liability companies, corporations and partnerships.
- Helped clients devise practical and effective business succession plans.
- Prepared buy-sell agreements, family business plans, purchase and sale agreements, and promissory notes.

### **ASSET PROTECTION PLANNING**

- Routinely advised clients on strategies for protecting assets from loss, risk and exposure, both during life and after death. Tools used include asset protection trusts, irrevocable trusts, limited liability companies, prenuptial and postnuptial agreements, and insurance planning.

## Experience

### PROBATE AND TRUST LITIGATION

- Represented individual and corporate fiduciaries in defending claims of breach of fiduciary duty, will contests, trust accountings, spousal claims, beneficiary rights and business owner disputes.
- Represented beneficiaries in proceedings involving replacement of trustee.
- Represented fiduciaries in seeking instruction from court regarding ambiguous trust terms.

## Education

- J.D., Saint Louis University
- LL.M., Washington University in St. Louis
  - Taxation
- B.A., Saint Mary's College

## Admissions

- Colorado
- Illinois
- Missouri

## Community Leadership

- Bishop Machebeuf High School, Board of Trustees, 2018-present