



Alison V. Lennarz
Of Counsel

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Alison is Of Counsel with Kaufman & Canoles. Her practice includes estate planning and administration, tax planning and compliance, and counseling small businesses, associations and non-profits. Alison works regularly with clients to address international issues, including income from foreign sources and overseas assets.

PRACTICE AREAS

- Estate, Trust & Wealth Transfer
- Business Taxation
- International

REPRESENTATIVE MATTERS

- Counseled high net-worth individuals in estate and tax planning matters involving assets located outside the U.S.
- Represented individuals holding off-shore accounts and other foreign assets in compliance with U.S. disclosure requirements
- Counseled personal representatives of estates and trusts having complex administration issues, such as the partition of real estate interests shared with over 40 title-holders, special use valuations, minor trusts, and assets outside the U.S.
- Represented purchasers and sellers of small- and medium-sized businesses in negotiation and settlement of asset and stock acquisitions and sales
- Represented taxpayers in IRC section 1031 exchanges
- Counseled non-profit entities in formation, tax, compliance, and related matters
- Represented sellers and purchasers in commercial, residential, and undeveloped real estate transactions
- Advised boards of directors of homeowners' associations and condominium unit owners' associations on matters pertaining to governance, compliance with laws and regulations, and developer issues

RECOGNITION AND HONORS

- Top Lawyers; *CoVaBIZ Magazine*, 2019-2022
- College of William & Mary Marshall Wythe School of Law; Adjunct Professor, 2004-2007
- Christopher Newport University Joseph W. Luter, III School of Business; Adjunct Professor, 2017
- College of William & Mary Mason School of Business; Adjunct Professor, 2019-2020

ASSOCIATIONS

- American Bar Association
- Virginia Bar Association
- Williamsburg Bar Association
- Virginia Peninsula Estate Planning Council

COMMUNITY SERVICE

- Williamsburg Community Foundation; Current Trustee
- Big Brothers and Big Sisters of the Greater Virginia Peninsula; Past Chair of Board of Directors
- Bruton Parish Church Foundation, Inc.; Past Chair of Board of Directors
- Stove Point Improvement Association; Past President of Board of Directors
- Fishing Bay Yacht Club; Past Junior Division Commander
- Hampton Roads Academy; Past Chair of Board of Trustees
- Windsor Forest Association; Past President of Board of Directors

ADMISSIONS

- Virginia

LANGUAGES

- French

EDUCATION

- University of Virginia; B.A., 1989
- Université Panthéon-Assas (Paris II), 1994-1995
- University of Richmond School of Law; J.D., 1998

WEBINARS

- Tax Planning for Year End 2012

PRESS AND PUBLICATION

- 40 Kaufman & Canoles Attorneys Named as Top Lawyers 2022 in *CoVaBIZ Magazine*
- 40 Kaufman & Canoles Attorneys Named as Top Lawyers 2021 in *CoVaBIZ Magazine*
- 45 Kaufman & Canoles Attorneys Named as Top Lawyers 2020 in *CoVaBIZ Magazine*
- 40 Kaufman & Canoles Attorneys Named as Top Lawyers 2019 in *CoVaBIZ Magazine*
- Business Tax Client Alert - May 2016
- Private Client Services Update - Foreign Asset Disclosure, Financial Reporting and Tax Planning in a Complex World
- FATCA is Coming to Your Foreign Financial Institution - Are You Ready
- Private Client Services Update - Minimizing the Impact of the New 3.8% Medicare Surtax on Trust Income
- Private Client Services Update - Estate Planning Considerations for Non-Citizens
- Private Client Services Update - IRS Has Two Smash Hits and Releases Offshore Voluntary Disclosure Program III
- Private Client Services Update - The FBAR and OVDI are not health foods . . . but you should know what they are and why the August 31, 2011 expiration date matters
- Private Client Services Update - Family Business Succession Planning (Beyond Taxes and Trusts)
- Private Client Services Update - No Federal Estate or GST Tax! Are These the Best of Tax Times or the Worst of Tax Times?
- Private Client Services Update - The FBAR and OVDI are not health foods . . . but you should know what they are and why the August 31, 2011 expiration date matters
- Private Client Services Update - Foreign Asset Disclosure, Financial Reporting and Tax Planning in a Complex World
- Private Client Services Update - Trump is President and Republicans Control Both Chambers of Congress...