



Gregory Herman-Giddens

Stockholder

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Greg Herman-Giddens is a problem solver and relishes the daily challenge to identify legal solutions for his clients. No matter what service he is providing, his top priority is always the best interests of the client. Greg offers a full array of estate planning and related services, including the creation of irrevocable trusts, estate, gift, fiduciary and individual income tax planning and compliance, taxation of deferred compensation, estate and trust administration, small business and nonprofit organization formation, trust modification and decanting, and trust protector services. He frequently is called upon to serve as an expert witness in trust and estate lawsuits.

Greg is a Certified Financial Planner™ and uses that knowledge to better serve his clients and those for whom he acts as a fiduciary. He's also a regular speaker at continuing education programs for lawyers, paralegals, and financial planners. Greg is a Registered Trust and Estate Practitioner (Society of Trust and Estate Practitioners) and a Board Certified Specialist in Estate Planning and Probate Law (North Carolina State Bar Board of Legal Specialization). He is admitted to practice in all Florida, New York, North Carolina, and Tennessee state courts, as well as in the U.S. Tax Court, U.S. Supreme Court, and the U.S. District Court, Middle District of North Carolina. Greg is also qualified as a solicitor in England and Wales.

Over his 30+ year career, Greg has received much recognition, including being honored as a North Carolina Super Lawyer in Estate Planning and Probate Law (2007, 2011, and 2017-2020), as well as being named one of North Carolina's Legal Elite in Tax and Estate Planning (2007, 2011) and a Triangle Impact Financial Leader (Triangle Business Leader Magazine, 2008). He is a member of the 2018 North Carolina Pro Bono Honor Society, is a recipient of the Pro Bono Publico Award from the New Hanover County Bar Association & Legal Aid of North Carolina Wilmington, and received the President's Volunteer Service Award in 2018. Greg is also a member of the Phi Beta Kappa honor society and Psi

Chi, the International Honor Society in Psychology.

Greg's leisure pursuits include running — he ran a 50-mile race to celebrate his 50th birthday — travel, and spending time with family. Before joining Henderson Franklin, Greg ran his own law firm in Chapel Hill, North Carolina, Miami, Florida and New York, New York.

Publications

- *"Income Taxation of Estates and Trusts"* WealthCounsel Quarterly, 2016
- *"IRA Tax Deferral: Trusts, Rollovers, and Distributions"* Estate Planning, 2014
- See Avvo estate planning lawyer profile for a complete list of publications and selected presentations.

Professional And Civic Affiliations

Greg is a member of the Real Property, Probate, and Trust Law Section of the Florida Bar, the Estate Planning and Fiduciary Law Section of the North Carolina Bar Association, and is a member of the Lee County and Collier County Bar Associations. Additionally, he is a Fellow of the American Bar Foundation and is a member and past president of the Orange County (NC) Bar Association and the 18th Judicial District Bar.

Greg is a member of WealthCounsel, LLC. He serves on the Carolina Meadows Board of Directors in Chapel Hill, NC, is a Full Member of the Society of Trust and Estate Practitioners ("STEP"), and is a pro bono panel member for North Carolina Center for Nonprofits. He previously served on the Board of Directors for the Chatham County Chamber of Commerce and Habitat for Humanity for Orange County.

Education

- University of North Carolina, B.A.
- Law Degree Tulane University Law School, J.D.
- Graduate Degree University of Miami School of Law, LL.M., Estate Planning
- Admitted to the Florida Bar, New York Bar, North Carolina Bar & Tennessee Bar
- A Non-Practicing Solicitor In England and Wales

Practice Areas

- Estate Planning & Trust Administration