Poyner Spruill LLP

Charlie Davis

PARTNER

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Charlie practices primarily in the areas of estate planning and administration, tax, and business law.

OFFICE LOCATIONS

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JURISDICTIONS LICENSED

North Carolina

BIOGRAPHY

Charlie Davis is a Board Certified Specialist in Estate Planning and Probate Law by the North Carolina State Bar Board of Legal Specialization. He has extensive experience advising individuals and families on their estate and tax planning needs and helps his clients develop estate planning strategies to accomplish their goals in a tax-efficient manner. Charlie also helps guide executors and trustees through all facets of the estate and trust administration process.

In addition to his trusts and estates work, Charlie advises businesses on their general corporate, succession planning, and tax planning needs, and provides tax advice in structuring business mergers and acquisitions. He also advises nonprofits on corporate and tax issues, including applications to be recognized as tax-exempt organizations.

AREAS OF FOCUS

TAX PLANNING

- Advises clients on the tax implications of entity structure and provides analysis of the taxation of M&A structures involving corporations, partnerships, and LLCs

TRUSTS & ESTATES

- Advises individuals and families on estate and trust planning issues, including the implications of estate, gift, and GST taxes

TRUST & ESTATE ADMINISTRATION

- Advises and assists families in the administration of estates and trusts

TRUST & ESTATE PLANNING

- Advises individuals and families in the estate planning process, including the preparation of wills, trusts, financial powers of attorney, health care powers of attorney and living wills

PREMARITAL & POSTMARITAL AGREEMENTS

- Assists individuals in the preparation and negotiation of premarital and postmarital agreements

OPPORTUNITY ZONES

- Advises clients on the tax benefits of qualified investments in opportunity zones
- Advises and assists clients in the formation of qualified opportunity funds and qualified opportunity zone businesses
- Advises clients on the operational and compliance issues of qualified opportunity funds and qualified opportunity zone businesses

CREDENTIALS

CERTIFICATIONS & SPECIALIZATIONS

Board Certified Specialist in Estate Planning and Probate Law by the North Carolina State Bar Board of Legal Specialization

Department of Veterans Affairs Accredited Attorney

EDUCATION

University of North Carolina School of Law, JD, 2014, *High Honors*

University of North Carolina at Chapel Hill, BS, 2011, *with Highest Distinction*

NOTABLE ACCOMPLISHMENTS

Beta Gamma Sigma

Phi Beta Kappa

Recognized in The Best Lawyers in America® in Tax Law 2021, Best Lawyers to Watch "Ones to Watch" 2021

PROFESSIONAL & COMMUNITY ACTIVITIES

Member, NCBA Estate Planning and Fiduciary Law Section, Continuing Education Committee, 2018 – present

Secretary, NCBA Business Section Council