

Jordan D. Taylor Attorney

jdt@dewittllp.com

608-252-9369

Madison

Jordan is a Partner in the Madison office of DeWitt and a member of the firm's Trusts & Estates, Business, and Real Estate practice groups. He represents owners of closely-held businesses, individuals, and families of all sizes focusing on legal issues surrounding business operations, succession planning, and wealth transfer. His practice often requires confronting and resolving the complex relationships among business partners and families, as well as the tax implications involved in the acquisition and transfer of assets, including to succeeding generations.

Representative client matters include:

- Drafting of estate plans for high net worth individuals and families at all levels of complexity employing strategies to reduce or eliminate federal estate and gift taxes, including the use of irrevocable trusts and charitable gift planning techniques.
- Counseling owners of closely-held businesses on all matters from the creation of new business ventures to mergers and acquisitions and the sale of a businesses, all in a tax-efficient manner.
- Negotiating business contracts for the purchase and sale of goods and services, licensing of intellectual property, and employment and non-compete agreements.
- Advising individual and corporate trustees regarding trust administration and termination, including strategies to modify trusts that do not require court intervention.
- Drafting commercial real estate purchase agreements and leases and working with municipalities on issues related to zoning and real estate property tax assessments.

Articles & Presentations

- "Tax Cuts and Jobs Act Doubles Estate and Gift Tax Exemptions Through 2025," DeWitt Estate Planning Blog, December 2017
- "IRS Provides Guidance for Same-Sex Married Couples to Recalculate Gift and Estate Tax Exemption," DeWitt Estate Planning Blog, February 2017

- “Tax Court Issues Reminder: Don’t Forget that “Contemporaneous Written Acknowledgement” for Charitable Deductions!” DeWitt Estate Planning Blog, January 2017
- “IRS Proposes Crackdown on Valuation Discounts: What You and Your Family Business Need to Know,” UW Family Business Center, Food for Thought Program, October 2016
- “IRS Reports \$391 Billion Gifted in 2012,” DeWitt Estate Planning Blog, October 2014
- “The New Rules of Estate Planning,” DeWitt Estate Planning Blog, October 2014
- “IRS Issues Final Regulations on Determining Which Trust & Estate Costs are Subject to Itemized Deduction Floor,” DeWitt Estate Planning Blog, May 2014
- “The Importance of Coordinating Retirement Beneficiary Designations,” DeWitt Estate Planning Blog, April 2014
- “New Ruling Inconsistent with IRS IRA Rollover Limits,” DeWitt Estate Planning Blog, February 2014
- “Federal Estate and Gift Tax Exclusion for 2014,” DeWitt Estate Planning Blog, January 2014
- “What’s the Big Deal? Why Taxpayers, the Courts and the IRS Disagree about a Discount for Built-in Gains” (ACTEC Journal, Volume 34, Number 3, Winter 2008, 187)

Expertise

- Trusts & Estates
- Business
- Real Estate, Land Use & Construction

Education

- LL.M. in Taxation, *with distinction*, Georgetown University Law Center
- J.D., *cum laude*, American University – Washington College of Law
- M.A., American University – School of International Service
- B.A., University of Wisconsin – Madison
- Certificate in Business, University of Wisconsin – Madison

Admissions

- State Bar of Wisconsin
- District of Columbia Bar