



## **Jamie L. Carter**

**Partner**

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**PRACTICES** Private Clients and Estate Planning, Family Office, Family Wealth and Estate Planning, Tax-Exempt Organizations and Private Foundations, Trust and Estate Administration, Fiduciary Disputes

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Jamie Carter is a counsel in the Private Client and Estate Planning Practice Group. Her areas of practice include wealth preservation and estate planning, estate and trust administration and taxation, and charitable organizations.

Jamie's practice focuses on planning and drafting estate planning documents and assisting clients in planning for both large and small estates, including wills, trusts, prenuptial and postnuptial agreements, family limited partnerships, charitable organizations, and various other estate planning techniques; family wealth planning and preservation; administering trusts and estates of decedents; and assisting clients with the establishment of tax-exempt organizations, including public charities, private foundations, supporting organizations, charitable trusts, employer-sponsored scholarship and emergency/disaster relief funds, business leagues, social welfare organizations, performing arts and cultural groups, churches and religious organizations, amateur athletic organizations, and international aid organizations.

### **Professional and Community Activities**

- State Bar of Texas, Real Estate, Probate and Trust Law Section, Tax Section
- Dallas Bar Association, Probate, Trusts, and Estates Section
- Dallas Estate Planning Council

### **Selected Publications and Speeches**

- "Federal Income Taxation of Trusts and Estates," presenter, Tax Alliance Conference, June 11, 2015.
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## **QUALIFICATIONS**

### **EDUCATION**

- J.D., Southern Methodist University Dedman School of Law, 2006, *cum laude*; Case Note/Comment Editor, *Computer Law Review & Technology Journal*
- B.S., University of Texas at Austin, 2003, *with honors*

## CLERKSHIPS

- The Honorable Barbra M.G. Lynn, United States District Court, Northern District of Texas (2005-2006)

## ADMISSIONS

- Texas