



Ryan Wautlet

SENIOR ASSOCIATE

THE LINK VIRTUAL
OFFICE

PHONE: 423.755.2687

CHATTANOOGA,
TN*

PHONE:
423.266.5500

EMAIL: RYAN.WAUTLET@HUSCHBLACKWELL.COM

OVERVIEW

Ryan works with high net worth families and individuals to develop and implement wealth and business transfer plans that fit their personal goals.

As a law student, Ryan discovered a fascination with tax law and the tax issues inherent in estate planning. He knew tax was an area many attorneys weren't qualified to handle, and he wanted to be sure that he could answer the questions that touched clients' daily lives and future plans.

Today, Ryan uses sophisticated estate planning techniques, including intentionally defective grantor trusts, dynasty trusts, asset protection trusts, grantor and non-grantor split-interest trusts, qualified personal residence trusts, installment sales and self-cancelling installment notes, FLPs and FLLCs, and private annuities to help clients develop wealth and business transfer plans. He regularly drafts instruments including last wills and testaments, revocable and irrevocable trust agreements, financial powers of attorney, advanced directives for healthcare, articles of organization, LP and LLC operating agreements, purchase and sale agreements, and assignment and transfer documents.

Ryan also has experience setting up nonprofit organizations and family foundations to meet clients' philanthropic goals. He helps clients work within public benefit corporation and charitable trust structures and apply for and maintain tax-exempt status. He also advises on the corporate governance issues involved in creating these foundations and provides counsel on their ongoing operations.

Industry

Financial Services & Capital
Markets

Service

Private Wealth

Ryan is known for his timely responses and his high-quality work, but he's most of all known simply for the trust clients have in him. Clients know that Ryan will use his knowledge and experience to create an estate plan that fits within legal technicalities while also meeting their personal goals and desires.

Experience

- Work with high net worth families and individuals to develop and implement mathematically based estate, cash flow, and wealth and business transfer plans utilizing sophisticated estate planning techniques, including intentionally defective grantor trusts, dynasty trusts, asset protection trusts, grantor and non-grantor split-interest trusts, qualified personal residence trusts, installment sales and self-cancelling installment notes, FLPs and FLLCs, and private annuities.
- Draft instruments including last wills and testaments, revocable and irrevocable trust agreements, financial powers of attorney, advanced directives for healthcare, articles of organization, LP and LLC operating agreements, purchase and sale agreements, assignment and transfer documents, and premarital agreements.
- Develop and implement life insurance plans using irrevocable life insurance trusts and split-dollar insurance agreements to provide a source of liquidity in the event any estate taxes become due.
- Assist clients in organizing non-profit organizations using public benefit corporation and charitable trust structures and applying for and maintaining tax-exempt status as public charities, private foundations and private operating foundations. Review and assist in the preparation of Form 990s.
- Serve as attorney of record for probate estates and advise personal representatives with estate administration.
- Review and assist in the preparation of gift and estate tax returns, including the drafting of adequate safe-harbor disclosure of non-gift transfer statements.

Experience

- Modeled the sale of a multi-billion dollar closely held business in order to show shareholders the value of continuing to own the company compared to selling the company and investing the proceeds in the market.

Education

- LL.M., New York University School of Law
- J.D., George Mason University Antonin Scalia Law School
- B.S., Arizona State University

Admissions

- Tennessee
- Virginia
- New York

Community Leadership

Ryan has served on the board of directors for Rooftop Nashville, an organization that provides rent stabilization and mortgage foreclosure assistance, since January 2020. He served as treasurer throughout 2021 and is presently serving as vice-chair of the board of directors.

*Ryan works remotely in Nashville, Tennessee. Contact Ryan via email or phone for in-person/virtual meetings. Use our Chattanooga office address for mail/deliveries.



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