



## Bruce A. Fowler

### SENIOR COUNSEL

DENVER, CO

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### OVERVIEW

**Bruce assists clients in structuring estate plans that achieve family objectives and minimize tax exposure.**

Bruce has more than 25 years of experience offering sophisticated estate and tax planning services to high-net-worth individuals and families. He helps clients understand and navigate options for the most effective transfer of family wealth, and the tax implications of those options. His in-depth understanding of the tax code and experience as a CPA helps him spot potential tax issues more efficiently, leading to estate plans tailored to client needs and concerns.

Bruce advises clients on the succession of closely held businesses and represents several large family foundations, as well as assisting clients in meeting philanthropic goals. In addition, he works very closely with trustees and beneficiaries in the administration of trusts and estates, and often represents parties involved in probate and trust litigation.

Bruce aims to develop long-term client relationships, often assisting the same individuals and families for multiple generations. Clients appreciate Bruce's dedication to understanding their unique goals and family situations, ensuring their customized plan meets their needs.

### Industry

Financial Services & Capital Markets

### Services

Private Wealth

Tax

Trust, Estate, & Fiduciary Litigation

## Experience

- Represented a \$70 million private foundation in structuring the organization and obtaining tax-exempt status; represented the foundation on tax-related matters and structuring grant agreements with grantee organizations.
- Counsel to trustees of several multimillion-dollar trusts involving complex family and closely held business issues.
- Counsel several families of family-owned businesses on estate tax and succession plan issues.
- Successfully represented the heir of a decedent with intentional interference with the right of inheritance claim against the heir's sibling who convinced their father to disinherit the heir.
- Successfully represented several automobile dealers against a \$2.5 million sales tax assessment, resulting in a complete victory for the dealers.
- Assisted the founder of a successful business in designing a tax-efficient and equitable plan to transfer ownership to the founder's son, while allowing the other family assets to be distributed to the other children not involved in the business.

## Recognition

- *The Best Lawyers In America*®
  - Litigation – Trusts and Estates
  - Tax Law
  - Trusts and Estates
- The Denver Foundation, Philanthropic Leadership Award, 2012
- Super Lawyers

## Education

- J.D., University of Tulsa College of Law
  - *Tulsa Law Journal*, Editor
- M.S., University of Tulsa
  - Taxation
- B.S., Oral Roberts University
  - Accounting

## Admissions

- Colorado
- Ohio
- Oklahoma

## Community Leadership

- Denver Metro Chamber of Commerce, Leadership Denver, 2009
- Kempe Foundation, Past Board of Directors, Secretary, 2012 - 2016
- PlatteForum; Board of Directors, Emeritus; Board of Directors, Chair, 2004–2007
- Riverfront Park Community Foundation, 2002–2022



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